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eum

In memoria di Valentina Oldano (1981-2017),
studiosa e amica

In memory of Valentina Oldano (1981-2017), a
fine scholar and a good friend

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*Essays and
Researches*



Saggi e
Ricerche

The new school movement in Russia: Konstantin N. Venttsel (1857-1947), the concept of «free upbringing» and the *Declaration of the rights of the child**

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ABSTRACT: This essay deals with the Russian pedagogue and philosopher of education Konstantin N. Venttsel (1857-1947), one of the main representatives of the new school movement in Russia, little known among Western historians of education. The article is made up of two parts, corresponding roughly to the pre- and post-revolutionary periods, describing the evolution of Venttsel's concept; each part is divided into four sections. After the Introduction, which places Venttsel in the context of the new school movement in Europe, the first part reconstructs Rousseau's and Tolstoy's influence on Venttsel's concept of free education and more generally his view of moral education, the declaration of child emancipation, the «Home of the Free Child» (a particular kindergarten realized on the basis of Venttsel's ideas of free upbringing) and finally the principle of authority and its meaning in the upbringing of the child. The second part highlights the evolution of Venttsel's theory after the Revolution, that is, his theory about free upbringing and the ideal children's garden, with particular attention paid to Western influences on Venttsel, the *Declaration of the rights of the child*, the concept of cosmic education and the philosophy of creative will. His pedagogical conceptions influenced the educational theories of others Russian pedagogues

* The Introduction and the Conclusion are the result of the common work of the two authors. Dorena Caroli has written the first part (1a, 1b, 1c, 1d), while Grigory Kornetov has written the second part (2a, 2b, 2c, 2d). The authors are grateful to Elisabeth Stone for the revision of their translation.

despite his legacy having been condemned to a period of oblivion in the Soviet Union for a long time after his death.

EET/TEE KEYWORDS: History of Education; Early education; Philosophy of Education; ; Russia; Soviet Union; XIX-XXth Centuries.

Introduction

The history of the new education movement in Russia, little known among Western specialists, can offer a new interpretation of the schools experiments that were carried out from the beginning of the century until the Bolshevik Revolution. These experiments have been defined respectively as «free education» or as «progressive education» by Lisa A. Kirschenbaum and Ronald Hideo Hayashida, who describe in their pioneer works the attempts to criticize the tsarist schools' pedagogical and teaching methods¹. Indeed, Hayashida argues that the period «from the 1890s to 1917, was a time of intellectual ferment and pedagogical activism for Russian progressive education. Although it was never a cohesive movement and had no strong organizational base that could launch its ideas on a large scale, free education was determined to provide revolutionary alternatives to the tsarist system through publicity (Gorbunov-Posadov), through moral and ethical suasion (Venttsel), though force of example (Shatskii) and even through the constraints of political exile (Krupskaia)»².

Among the representatives of this heterogeneous movement, Konstantin Nikolayevich Venttsel (1857–1947) can be considered an advocate of the *nouvelle éducation* conception in Russia, as the authoritative research by Elena Astaf'eva has demonstrated³. One of the most interesting aspects of this

¹ See the pioneer analysis presented by R.H. Hayashida, *The pedagogy of protest: Russia Progressive Education on the Eve of Revolution*, «Slavic East European Education Review», vol. 2, 1978, pp. 11-30; L.A. Kirschenbaum, *Small comrades. Revolutionizing Childhood in Soviet Russia, 1917-1932*, New York, Routledge Falmer, 2001, pp. 20-23, 69-70.

² Hayashida, *The pedagogy of protest: Russia Progressive Education on the Eve of Revolution*, cit., p. 12.

³ In this regard see interesting results attained by: E.N. Astaf'eva, *Pedagogicheskoe techenie svobodnogo vospitaniia na Zapade* [The pedagogical tendency of free upbringing on the Western societies], in G.G. Kornetov (ed.), *Istoriko-pedagogicheskii Ezhegodnik* [Historical and pedagogical Yearbook], Moskva, ASOU, 2015, pp. 77-90; Ead., *Svobodnoe vospitanie v Rossii v konce XIX – pervoi chetverti XX veka* [Free upbringing in Russia at the end of the XIX century–early XX century], «Istoriko-pedagogicheskii zhurnal», vol. 2, 2015, pp. 80-99; Ead., *Priroda i svoboda rebenka v otechestvennoi pedagogike pervoi treti XX veka* [The nature and the freedom of the child in the national pedagogy of the first three decades of the XX century], in G.B. Kornetov (ed.), *Istoriko-pedagogicheskoe znanie v nachale III tysiacheletii: pedagogicheskie napravleniia v teorii i praktike obrazovaniia: materialy Odinnadcatoi Mezhdunarodnoi nauchnoi konferencii. Moskva, 19 noiabria 2015* [Historical and pedagogical knowledge at the beginning of the Third Millennium: pedagogical orientations in the theory and practices of the education: proceedings of the Eleventh

Russian pedagogue's work is that he elaborated a theory of free education characterized by some utopian elements concerning the renewal of education, and in particular early education, not only within institutions but also within the family. Venttsel's eclectic theory evolved from free upbringing to a cosmic philosophy of education, starting from the pedagogical ideas and practice elaborated by Lev N. Tolstoy (1828-1910) in his school in Yasnaia Poliana in the 1860s until the mid-1870s⁴, and evolving in response to the complex European ideas that circulated through translations and probable direct contacts with the *New Education Fellowship*⁵.

Venttsel's theory belonged to the free education movement developed in Moscow between 1906 and 1917. This movement gathered together pedagogues who wanted to renew educational methods on the basis of scientific principles, and the radical intelligentsia who were aspiring to social reforms, around the journal «Free Education» («Svobodnoe Vospitanie») under I.I. Gorbunov-Posadov, a close friend of Tolstoy, which was published in the years 1907-1917 and mostly protested against professional education⁶. Venttsel's conception of "free education" has been revisited recently thanks to the work of a group of brilliant scholars interested in rediscovering and re-evaluating Russian and Soviet education⁷, which has been overshadowed for almost half a century by Marxist pedagogy⁸.

Like the different theoreticians of the new schools movement⁹, Venttsel undoubtedly was inspired by the work of the Swedish feminist Ellen Key (1849-

International Scientific conference. Moscow, 19th November 2015], Moskva, ASOU, 2015, pp. 22-36; Ead., *Svobodnoe vospitanie v istorii pedagogiki* [Free upbringing in the history of pedagogy], in G.B. Kornetov (ed.), *Istoricheskie puti razvitiia obrazovaniia i pedagogiki* [Historical paths of development of education and pedagogy], Moskva, ASOU, 2015, pp. 110-139.

⁴ E. Mossman, *Tolstoi and Peasant Learning in the Era of the Great Reforms*, in B. Eklof (ed.), *School and Society in Tsarist and Soviet Russia. Selected papers from the Fourth World Congress for Soviet and East European Studies*, Harrogate, Houndmills et al., The Macmillan Press LTD, 1993, pp. 36-69.

⁵ W. Boyd, W. Rawson, *The story of the new education*, London, Heinemann, 1965, pp. 76-78. See also the analysis which concerns the following period by A. Van Gorp, F. Simon, M. Depaepe, *Frictions and Fractions in the New Education Fellowship, 1920s-1930s: Montessori(ans) v. Decroly(ans)*, «History of Education & Children's Literature», vol. XII, n. 1, 2017, pp. 251-270.

⁶ In this regard see Hayashida, *The pedagogy of protest: Russia Progressive Education on the Eve of Revolution*, cit., pp. 11-30.

⁷ K.N. Venttsel, *Svobodnoe vospitanie. Sbornik izbrannykh trudov* [Free upbringing. Collection of selected works]. Pod red. L.D. Filonenko, Moskva, Assotsiatsiia "Professional'noe obrazovanie", 1993; G.K. Kornetov, M.V. Boguslavskii (edd.), *Venttsel*, Moskva, Izdatel'skii Dom Shalby Amonashvili, 1999; G.K. Kornetov (ed.), *Zhizn' i pedagogika Kostantina Venttsel'ia* [Venttsel's life and pedagogy], Moskva, ASOU, 2007; Id., *Svobodnoe vospitanie v Rossi: K.N. Venttsel i S.N. Durylin. Antologiya pedagogicheskoi mysli* [Free upbringing in Russia: K.N. Venttsel and S.N. Durylin], Moskva, ASOU, 2008.

⁸ D. Caroli, *New Trends in the History of Childhood, Education and School Institutions in Post-Communist Russia (1986-2012)*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 133-169.

⁹ K.J. Brehony, *A New Education for a New Era: the contribution of the conferences of*

1926), translated into Russian in 1906, which sought to improve children's lives through important social reforms to be implemented during the twentieth century¹⁰. In fact, Venttsel sought to liberate children's energies and creativity and to organize child-centered institutions that fostered the growth of children's personalities, without the constraints and authoritarianism that characterized tsarist schools.

A brilliant article by Kevin J. Brehony opens up new perspectives for the interpretation of the new school movement in the socialist context, characterizing it as follows: «The New Education was an international social movement [...] whose objective was the reform of existing school systems, educational ideologies and discourses and pedagogy. This social movement was made up of a number of diverse strands that are not easily captured by a simple binary consisting of the New Education on the one hand and the educational sciences as disciplinary field on the other»¹¹.

Thus, the purpose of this article is not to present the tangled and thick genealogy of the ideas of Western pedagogues and theoreticians that influenced Venttsel's conception¹² – although this could also constitute a challenging approach in order to understand the cultural context of Russian pedagogy at the beginning of the twentieth century – but to present the evolution of the concept of a pedagogue who lived after the Great Russian Reforms (1864) and into the first half of the twentieth century, surviving the Revolutions and the first phase of Stalinism. In fact, unlike pedologists who ceased working or fell victim to the repression of pedology¹³, Venttsel, a non-Marxist pedagogue,

the New Education Fellowship to the disciplinary field of education 1921-1938, «Paedagogica Historica», vol. 40, nn. 5-6, 2004, pp. 733-755.

¹⁰ D. Caroli, *Il "nuovo bambino" in Unione sovietica dalla Rivoluzione d'ottobre alla caduta del regime comunista (1917-1991)*, in M. Gecchele, S. Polenghi, P. Dal Toso (edd.), *Il Novecento: il secolo del bambino?*, Bergamo, Edizioni Junior-Gruppo Spaggiari, 2017, pp. 105-123.

¹¹ K. Brehony, *Representations of Socialist educational experiments in the 1920s and 1930s. The place of Sciences of Education*, in R. Hofstetter, B. Schneuwly (edd.), *Passion, fusion, tension. Éducation nouvelle et sciences de l'éducation, fin 19^e, milieu du 20^e siècle*, Berne, Peter Lang, 2006, pp. 272-304 (see p. 273).

¹² D. Hameline, J. Helmchen, J. Oelkers, *L'éducation nouvelle et les enjeux de son histoire. Actes du colloque international des Archives "Institut Jean-Jacques Rousseau". "L'éducation nouvelle, au-delà de l'histoire hagiographique ou polémique"*, Genève, avril 1992, Bern, Peter Lang, 1995. See also the chapter on the movement for the new education by G. Chiosso, *Novecento pedagogico. Profilo delle teorie educative contemporanee*, Brescia, La Scuola, 1997, pp. 53-77; A. Ohayon, D. Ottavi, A. Savoye (edd.), *L'Éducation nouvelle, histoire, présence et devenir*, Bern, Peter Lang, 2004; D. Hameline, *L'éducation nouvelle après l'Éducation nouvelle*, «Paedagogica Historica», vol. 42, nn. 1-2, 2006, pp. 263-290; R. Hofstetter, B. Schneuwly, *L'engagement scientifique et réformiste en faveur de la "nouvelle pédagogie"*. Genève dans le contexte international Première décades du 20^e siècle, in Hofstetter, Schneuwly (edd.), *Passion, fusion, tension*, cit. pp. 108-141; J. Helmchen, *Les savoirs autour de l'Éducation Nouvelle*, «Paedagogica Historica», vol. 45, nn. 4-5, 2009, pp. 673-684.

¹³ D. Caroli, *Koncepciia S.S. Molozhavogo: mezhdū istoricheskim monizmom i repressiiami pedagogii (1924-1937)* [S.S. Molozhavyj's conception: between the historical monism and the

“survived”, for unknown causes, but probably because he passed a period in tsarist prisons: life had already been very hard for him, and he was very sensitive to children’s nature.

The article is made up of two parts, corresponding roughly to the pre- and post-revolutionary periods, describing the evolution of Venttsel’s concept; each part is divided into four sections. The first part reconstructs Rousseau’s and Tolstoy’s influence on Venttsel’s concept of free education and more generally his view of moral education, the declaration of child emancipation, the «Home of the Free Child» (a particular kindergarten realized on the basis of Venttsel’s ideas of free upbringing and with his direct collaboration) and finally the principle of authority and its meaning in the upbringing of the child. The second part highlights the evolution of Venttsel’s theory after the Revolution, that is, his theory about free upbringing and the ideal children’s garden, with particular attention paid to Western influences on Venttsel, the *Declaration of the rights of the child*, the concept of cosmic education and the philosophy of creative will. His pedagogical theories were relevant after the October Revolution to concepts about the family but also to school reform, in particular that of the so-called Petrograders, the group led by Anatoly Lunacharskii and Liudmila Menzhinskaia, who were more progressive than the Moscow group, the so-called Muscovites. The Petrograders «believed in anti-authoritarian, non scholastic education which would encourage full development of the child’s individuality, using the methods of Dewey’s ‘activity school’»¹⁴. In spite of the long period of oblivion to which this pedagogue was condemned in the Soviet Union after his death, Venttsel’s ideas have also been at the basis of educational theories devised to renew Marxist pedagogy after the fall of the communist regime.

repression of the pedology (1924-1937)], in G.B. Kornetov (ed.), *Istoriko-pedagogicheskoe znanie v nachale III tysiacheletia: istoriia pedagogiki kak pedagogicheskaia i istoricheskaia nauka. Materialy Desiatoi mezhdunarodnoi nauchnoi konferencii, 13 noiabria 2014 g.* [Historical and pedagogical knowledge at the beginning of the Third Millennium: history of pedagogy as pedagogical and historical science. Proceeding of the Tenth International scientific conference, 13th November 2014], Moskva, ASOU, 2014, pp. 79-103.

¹⁴ S. Fitzpatrick, *The Commissariat of Enlightenment. Soviet Organization of Education and the Arts under Lunacharsky, October 1917-1921*, Cambridge, Cambridge University Press, 1970, pp. 29-30.

1. *Konstantin Venttsel's theory and the theory of free upbringing*

1a. *Rousseau's and Tolstoy's influence on Venttsel's concepts of upbringing and education*

Konstantin N. Venttsel was born in 1857 in St. Petersburg in the noble family of a high-ranking official. In 1875 he graduated from the real school (real gymnasium), going on to study firstly at the Technological Institute, then at the Faculty of Law of St. Petersburg University, although he left before completing his studies. Tolstoy's article *On Public Education* (O narodnom obrazovanii, 1861), published in the first issue of the journal «Yasnaia Poliana», influenced Venttsel's theories even before he read Rousseau's original work¹⁵. The well-known Russian philosopher of education Sergej Hessen (1887-1950)¹⁶, who emigrated first to Prague and then to Poland, stated that Venttsel, following in Tolstoy's tracks, considered that the principle of authority was responsible for the corruption of education. Hessen continued that

it is necessary to destroy 'the stick of authority', and the new school have to constitute the first step for the achievement of a non authoritarian society¹⁷.

In *On Public Education* Tolstoy points out a contradiction, saying that, on the one hand, «the people want education, and each individual person unconsciously strives for education, and on the other hand, the people constantly oppose the efforts that society or the government uses for its formation». He questions, indignantly, why the school has «to force the younger generation to learn in a certain way»¹⁸.

According to the Tolstoy, «the school justly appears to the child as an institution, where he learns what he doesn't want to learn and the teacher is seen as an enemy who teaches very difficult matters». Tolstoy was convinced that

¹⁵ Concerning the circulation of Rousseau's works in Russia, see T. Barran, *Russia Reads Rousseau, 1762-1825*, Evanston, Illinois, Northwestern University Press, 2002, pp. 253-316, and for Rousseau's influence on educational thought and institutions, see D. Caroli, *La ricezione di Rousseau in Russia e l'educazione dell'uomo libero (metà Settecento-metà Ottocento)*, in G. Bertagna (ed.), *Il «pedagogista» Rousseau tra metafisica, etica e politica*, Brescia, La Scuola, 2014, pp. 249-276.

¹⁶ D. Caroli, *Russian Schools abroad. National identities, Soviet reforms and cosmopolitan education by Sergey I. Hessen (1887-1950)*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 527-553.

¹⁷ For the quotation, see the following edition by S. Hessen, *Autobiografia. La pedagogia russa del XX secolo*, ed. by Luigi Volpicelli, Roma, Avio, Armando Editore, 1956, pp. 77-78.

¹⁸ L.N. Tolstoi, *O narodnom obrazovanii* [About popular education], in L.N. Tolstoi, *Pedagogicheskie sochineniia* [Pedagogical works], Moskva, Pedagogika, 1989, pp. 54-70 (see pp. 54, 57).

the teaching must be only an answer to the question, stirred up by life. But the school not only does not raise questions, it does not even respond to those ones who are aroused by life. Therefore schools, organized from above and forcibly, are not a shepherd for the herd, but a herd for the shepherd. The schools have been established not so that the children were comfortable to study, but so that the teachers were comfortable to teach¹⁹.

The teacher is made uncomfortable by the talk, movement and gaiety of children, which are the necessary elements for teaching, and in schools that are built like prison establishments, questions, conversations and movement are prohibited. Instead of conceiving that in order to learn any subject successfully one must study it (and that in education, the subject is the free child), they want to teach as well as they can and as they like, and when they fail, they want to change not the way they teach but the very nature of the child.

Nevertheless, there were some aspects of Tolstoy's conception that Venttsel criticized, because

the aim of moral education doesn't consist in the inspiration of the good, but in awaking in the child an autonomous and free will, an independent moral creation, so that our [moral] ideal appears as primary substance, freely and creatively reworked in higher forms²⁰.

Beginning in 1881, Venttsel participated in the activities of the revolutionary circles of the Populists (Narodniki), whose members opposed the tsarist autocracy and discussed new ways forward for Russia. In 1884, he and his family moved to Voronezh, where he carefully studied the works of the philosophers K. Marx and G. Spencer, and of the Russian populists P.L. Lavrov and N.K. Mikhailovsky. In December 1885 Venttsel, and later his wife, were arrested for possessing prohibited literature and spent more than a year in prison. While incarcerated he read Jean-Jacques Rousseau's treatise *Émile ou de l'éducation*, which impressed him and stimulated his interest in the problems of pedagogy.

It was during this period that Venttsel first formulated his conception of the goal of upbringing based on the idea of freedom. Free upbringing should educate a person with several qualities and capabilities, quite "a new man" free from all the negative influences of the past education, and with a new culture and social behavior. This ideal person should have a free mind and feeling and will; his thoughts should be «free from the dominance of all authority and tradition and, guided by strict criticism, [he] independently develops his worldview [...]; «guided in his actions by his free will, and not by the will perceived by him in one form or another». This person should also be «a harmonic whole, i.e. whose all sides act in agreement between themselves»; «a natural and furthermore a moral person whose actions are aimed at the benefit and happiness of other people and in general». By developing his individuality, this person has «the highest

¹⁹ *Ibid.*, pp. 59-62.

²⁰ Hessen, *Autobiografia. La pedagogia russa del XX secolo*, cit., p. 77.

ability to live in communication with his fellow human beings – people», is «autonomous and independent in his work, but at the same time highly capable of the broadest collective work in the community with other people». Finally this persons should be «a *life* lover in all its manifestations, whether it manifests itself in the play of colors or in the brilliance of the sunbeam, the growth of grain or in the singing of a bird, in the babble of a baby or in the mother's concerns about him, whether a person develops human feelings or in education of harmonious social life [...]»; «he must be altruistic to the highest degree, and his altruism will spread not only to all mankind, but to all life, to the whole world. Hence it is clear that he must be more than human or *philanthropic* (chelovekoliubiv), because humanity implies only the attitude of man to man, he should be, if one may so express it, peaceful or, more accurately, express my thought, be a *life-loving* (zhizneliubiv) person». Thus, it will be a person who «acquires this high *feeling in social work*»²¹.

On the basis of this consideration, an ideal view of the child and of human nature also emerges that stresses the powerful role played by education, an idea that Venttsel developed throughout his life. In January 1887, Venttsel spent three years under control of the police, first in the town of Bobrov (Voronezh province), then in the town of Zemlyansk. During these years he wrote a series of articles devoted to the problems of morality, free of will and moral ideals. He was greatly influenced by the French philosopher Jean-Marie Guyau (1854-1888), who

strove to synthesize the individualism of the representatives of the English school with the ideas of solidarity typical of the French school of positivism [...]. For J.-M. Guyau's concept of 'life' is rather vague and amorphous. It is a kind of metaphor that embodies the creative dynamics of being. And just like for most representatives of this direction, for J.-M. Guyau the concept of life is the basis for constructing a new, non-classical doctrine of values²².

In September 1891, when his period of exile ended, Venttsel moved to Moscow, where he lived until the beginning of 1919, and joined the Statistical Division of the Moscow Municipal Public Administration²³. In 1896, one year before the foundation of the League of Moral Education (1897)²⁴, Venttsel

²¹ K.N. Venttsel, *Iz perezhitogo-peredumannogo, perechustvovannogo i sdellanogo* [About the Experienced, reconsidered, resented and done], in Kornetov (ed.), *Zhizn' i pedagogika Konstantina Venttsel'ia*, cit., pp. 7-303 (see in particular pp. 74-75).

²² E.V. Zheludeva, *Sotsial'no-filosofskie vozreniia J.M. Guyot: istoriko-filosofskii analiz. Dissertaciia na soiskanie uchenoi stepeni kandidata filosoficheskikh nauk* [J.M. Guyot's Social and philosophical views: historical and philosophical analysis. Dissertation for the attainment of the scientific degree of "Candidat of philosophical sciences"], Moskva, Voennyj Universitet, 2007, p. 12.

²³ During these years Venttsel wrote and published papers on different philosophical and ethical problems: for the *Encyclopedic Desk Dictionary* (Nastol'nyj Enciklopedicheskii slovar'), he wrote several articles including "Love", "Metaphysics", "Materialism", "Mysticism", "Positivism" and others.

²⁴ M. Cicchini, *Un bouillon de culture pour les sciences de l'éducation. Le Congrès international d'éducation morale (1908-1934)*, «Paedagogica Historica», vol. XL, nn. 5-6, 2004, pp. 633-656.

published his first article on pedagogy, entitled *The main tasks of moral education* (Glavnye zadachi moral'nogo vospitaniia), in the «Journal of Education» («Vestnik Vospitaniia»), writing that

educating moral desires in a person, making him an indefatigable fighter for the moral ideal, so that his whole life serves as a living embodiment of this ideal is the most difficult and at the same time, perhaps the most important thing in the field of education. Physical and mental education play in relation to the moral, one can say, only a purely subordinate role²⁵.

According to Venttsel,

morality is the desire to realize what is for a man himself the highest, the most sacred, the best, whatever name he gives to this high, holy and best – truth, duty, good or else like [...] The highest, the most precious good and treasure for a person is 'life' [...] Morality therefore is nothing but a conscious aspiration and activity aimed at increasing the total amount and tension of life in the world²⁶.

Describing the purpose of education, he added that:

Upbringing should put as goal the human shaping (vyrabotka cheloveka), which would have the ability to the fullest extent, precision and clarity, to perceive events surrounding his life, which could most easily, freely and for a long time keep everything in its memory that he had to endure and accept, and which, finally, to the highest degree possessed the gift of creative process available to his psychic material to create from it a perfect possible combination of real life. Creativity is the highest spiritual capacity²⁷.

In a later article, *Moral Upbringing and Freedom* (Moral'noe vospitanie i svoboda, 1908), Venttsel concretized the ideas he expressed in his first pedagogical article in the following way. He stated that the progress of mankind in the field of morality is delayed and hampered by the fact that «the creative will» is not cultivated in moral education from the very early years in the child, and «the moral ideal remains therefore unchanged for long ages», even though generations, and he continues that:

We are still tramping along the beaten track of one and the same traditional morality. But if this traditional morality was once the surmounting of a lower morality, then should not it, in turn, be overcome someday by another higher form of morality. And if we want this to happen as soon as possible, we should, as much as possible, facilitate the path for moral creativity (moral'noe tvorchestvo), we must in every child see the possible creator of the future new higher morality, and by appropriate moral education we should facilitate in him the opportunity to become such a creator [...]. The goal of moral education is not 'the instilling

²⁵ K.N. Venttsel, *Ocherednye zadachi nraustvennogo vospitaniia* [Extraordinary tasks of the moral education], in Id., *Etika i pedagogika tvorcheskoi lichnosti. T. 2. Pedagogika tvorcheskoi lichnosti* [Ethics and pedagogy of the creative personality. T. 2. Pedagogy of the creative personality], Moskva, Knogoizdatel'stvo N.I. Tikhomorova, 1912, p. 389.

²⁶ *Ibid.*, pp. 390-391.

²⁷ *Ibid.*, p. 398.

of good', as we, the educators understand it, not the imposition of our moral ideal in children by imitation and other mental processes, but the awakening in the child of an independent, free moral will, an original moral creativity for which our moral ideal is only material that is freely and creatively processed into higher forms. Only *such* moral education, giving *such* tasks, will lead mankind continuously to an ever greater and greater moral perfection and will raise ever higher and higher the moral ideal of mankind. For its moral progress, mankind needs as many independent free creators of the new independent, original morality as possible and in the least possible number of representatives of 'gregarious morality' (stadnaia moral'), eternal and unchanging for ever and ever. Only people who are 'free in spirit', only 'eternal seekers' can be the engines of moral progress in humanity. And only in an atmosphere of pure and full spiritual freedom can grow a flower of true real morality»²⁸.

Beginning in the early 1900s Venttsel was an active participant in the Pedagogical Society established at Moscow University. He moved from theory to action, developing new methods and activities for the renewal of educational institutions, and wrote numerous articles. At this time, the main topic of Venttsel's work was free upbringing, based on the educational needs of his children. On July 14, 1904 he wrote that, he set himself the goal of elaborating and clarifying the question «about free and rational upbringing (svobodnoe i razumnoe vospitanie)»:

to clearly show the possibility of practicing rational and free education, but reasonable and free upbringing does not at all mean to indulge in utopia. And if this is even a utopia, then in any case it must be our guiding star, if even education can't be made reasonable and free, then it must be done as much as possible²⁹.

His draft was subsequently published in the pamphlet *The Emancipation of the child* (Osvobozhdenie rebenka) and read as a report titled *On the Principle of Freedom in Its Specific Application to the Field of Upbringing and Education* during the meeting of the Commission on the Issue of Organization of Family Schools on February 12, 1905, producing a positive impression on the public interested in changing and renewing education within the family. In this regard, Hayashida argues that

the Revolution prevented the immediate realization of the family school. But Venttsel, through his participation in various strike committees, was ineluctably drawn to the conclusion that any radical educational innovation would not be possible without a corresponding transformation of Russian Society³⁰.

²⁸ Venttsel, *Nravstvennoe vospitanie i svoboda* [Moral education and Freedom], in Id., *Etika i pedagogika tvorcheskoi lichnosti*, cit., pp. 571-572.

²⁹ Venttsel, *Iz Perezhitogo-peredumannogo i sdelannogo*, cit., p. 205.

³⁰ Hayashida, *The pedagogy of protest: Russia Progressive Education on the Eve of Revolution*, cit., p. 15.

2b. *The emancipation of the child*

The realization of Venttsel's ideas is connected with the particular political situation in Russia. During the years 1905-1907 in Russia, an attempt was made to revolutionize the social system aimed at democratization of political power and the elimination of the remnants of feudalism in the country's economy. Various reforms in the fields of education, charity and justice contributed to the introduction of several changes to children's lives³¹.

Venttsel published the pamphlet *The Emancipation of the child* amid the revolutionary wave of 1906, and it was subsequently reprinted twice. In the pamphlet, for the first time, the quintessence of the ideas of free upbringing, presented in a broad social context, was systematically set forth. The human being, Venttsel argued, has three great goals: the liberation of the child, the liberation of oneself and the liberation of society. At the same time he stressed that «a free school, free upbringing is a necessary precondition for a free society and a free person»³². That is why Venttsel saw child-oriented pedagogy as an important tool not only for the transformation of educational practice, but for the transformation of social life as a whole.

In his pamphlet Venttsel formulated and substantiated the following main points, that constituted a manifest of free education in the early twentieth-century Russia. Starting from the assumption that «every child born to the world has the right to education» that should not be excessive «since upbringing in the form in which it is often and predominantly carried out, in most cases constitutes a violence against the child's personality and violence against that future person, who could later emerge from the child if his development were accomplished freely, without any interference». Venttsel stated also that in the contemporary systems of education

the child is an instrument, a mean, but not an autonomous goal. We strive to make it the embodiment of our ideal, we prepare from it a convenient member of the social order in which we live and in which, by our assumption, he will also have to live [...].

He continued that the child needed a «*Magna Carta* of freedom», because he «is not a thing, not a doll, not a toy, not the property of his parents and educators». His concept was a prelude to deep educational changes, because:

A free child who unfolds in his unhindered interaction with nature and wide fraternal fellowship (*bratskoe obshchenie*) with people his strengths and

³¹ See for example the school reforms described by B. Eklof, *The Myth of the Zemstvo School: The Sources of the Expansion of Rural Education in Imperial Russia: 1864-1914*, «History of Education Quarterly», vol. 24, n. 4, 1984, pp. 561-584 (see in particular pp. 561-562); and the justice reforms analysed by D. Caroli, *Les enfants abandonnés dans la Russie tsariste pré-révolutionnaire*, «Cahiers du Monde Russe», vol. 38, n. 3, 1997, pp. 367-385.

³² K.N. Venttsel, *Osvobozhdenie rebenka* [The emancipation of the child]. 3 Izd. Ispravlennoe i dopolnennoe, Moskva, Kooperativnoe izdatel'stvo "Zemlia i Fabrika", 1923, p. 18.

abilities – this is the first and last word of ‘new education’, which alone can counterbalance the degeneration and the process of being paltry of mankind that is evident in the last time. The modern school, the school-factory, the penal colony, the dungeon school, on which the sin of the spiritual degeneration of mankind largely lies, should be replaced by the free school.

Free upbringing must finally displace that system of education, in which man is the subject for training (dressirovka) or the object of factory production.

How could the child’s complete freedom in the field of upbringing and education be ensured? The very first and basic condition here is the constant observation and study of the nature of the child and the provision of the possibility of satisfying all the naturally occurring needs in him, arising from the process of his development [...].

Only free upbringing and education will give an opportunity to open up to the educator the best system of upbringing that corresponds to the nature of that particular child, whose the upbringing is going on [...]³³.

Children do not exist for the system of upbringing and education, these systems exist for children and must be adapted to their nature, to their individual needs, requests and aspirations [...]³⁴. In our society, besides all other forms of slavery, political, economic, slavery of women, ecc., there is another type of slavery, this is slavery of children, slavery of the younger generation. Our children, our younger generation are slaves, on which the chains of our prejudices, our views, according to which we are trying to regulate their life, development and upbringing, rustle [...]³⁵.

The liberated child is the alpha and omega of all freedoms, this is the only and real guarantee of their great and complete fulfillment [...]³⁶.

And people and social relations between them only then will become rapid steps to continuously improve, when the upbringing and education of the younger generation will be free and built on rational principles, when there will be a free school, understanding this word in the broadest sense. A free school, free upbringing is the *conditio sine qua non* for a free society and a free person. To the extent that we, adults, already feel free, we must direct our efforts to free the child, to free the young generation from the age-old oppression in which they are. This is the key to the liberation of all mankind from all forms of oppression and violence»³⁷.

Vettsel’s proposals were even more progressive for the «century of the child» in comparison with E. Key’s work (Barnets århundrade, 1900), which immediately influenced children’s culture between the Russian intelligentsia. Developing the theory of free upbringing, Venttsel sought to implement new

³³ *Ibid.*, p. 9.

³⁴ *Ibid.*, p. 10.

³⁵ *Ibid.*, p. 16.

³⁶ *Ibid.*, p. 17.

³⁷ *Ibid.*, p. 18.

pedagogical ideas in the practice of educational institutions. M. Stanislavskaia opened a small family kindergarten in Moscow in 1903, striving to realize for the first time the principles of free upbringing. It operated continuously until the spring of 1906, when, according to Venttsel, the parents who initiated it, strove at giving a more solid and stable form, and at creating favorable conditions for its transformation to a free family school. And in the spring of 1906 on behalf this group, Venttsel drafted a call and proposed «to unite all of us for the creation of a new free upbringing and educational institution, called the ‘Home of the Free Child’» in almost all Moscow newspapers. Both parents and teachers wished to take part in the school’s attempt to implement the school on the principles of free upbringing. At the end of August or the beginning of September, the practical implementation of the planned enterprise also began³⁸.

2c. *The organization of the «Home of the Free Child» in Moscow*

Nathalie Duval, in her article reconstructing the diffusion of the new school movement throughout Europe after the foundation of the *Bureau International des écoles nouvelles* (BIEN) by Adolphe Ferrière in 1899, argues that in Russia the most important experiences were those realized by the well-known Russian pedagogue Stanislav T. Shatskii (1878-1934) in Moscow before and after the Revolution³⁹. But there were several others that are as yet little known. The history of the «Home of the Free Child», which operated in Moscow from 1906 to 1909, can also be considered one of the main experiments in new schools in Russia⁴⁰, which was similar to those carried out by Maria Khrisanfonovna Sventiskaia (1855-1932) in the Arbat district of Moscow⁴¹. Furthermore, the pedagogues S.I. Schatsky and L. Shlegler also took part in the organization of this experimental kindergarten, aiming to break with the Froebelian methods and to adopt some of Montessori’s ideas, which were spreading very quickly in Russia⁴².

³⁸ Venttsel, *Iz perezhitogo-peredumannogo*, cit., p. 216.

³⁹ N. Duval, *L’éducation nouvelle dans les sociétés européennes à la fin du XIX^e siècle*, «Histoire, économie et société», vol. 21, n. 1, 2002, pp. 71-86 (see in particular pp. 78, 82).

⁴⁰ M.V. Kistiakovskaia, E.E. Gorbunova-Posadova, *Opyt novoi shkoly «Dom svobodnogo rebenka» (Pervyi opyt svobodnoi shkoly)* [The experience of the new school ‘Home of the Free Child’ (First experience of the free school)], Moskva, Gosudarstvennoe Izdatel’stvo, 1923, pp. 43-83. See also the reconstruction of this experience by M.V. Mikhaylova, *Dom svobodnogo rebenka (K 125-letiiu so dnia rozhdeniia K.N. Venttsel’ia)* [The Home of the Free Child (For the 125 year from K.N. Venttsel’s birth)], «Sovetskaia pedagogika», vol. 4, 1983, pp. 102-106.

⁴¹ Kirschenbaum, *Small comrades*, cit., pp. 23-24.

⁴² Hessen, *Autobiografia. La pedagogia russa del XX secolo*, cit., p. 80. Concerning the Froebelian tradition, see also Y. Valkanova, K.J. Brehony, *The Gifts and Contributions: Friedrich Froebel and Russian Education (1850-1929)*, «History of Education», vol. 35, n. 2, 2006, pp. 189-207.

In «The Home of the Free Child» (How to build a free school), Venttsel gave a detailed description of the ideal school to which the kindergarten, that is, his «Home of the Free Child», should strive⁴³:

it was moreover intended to be ‘a school without programs, without classes, without tutors’ – free of the baneful authority of parents or teachers – where the slogan ‘Freedom and More Freedom’ would reign. Similar to a Froebelian kindergarten for school-age youngsters, the Home would encourage learning about life and nature primarily in workshops where those of preschool age would be familiarized with ‘the most diverse aspects of production labor’⁴⁴.

According to Venttsel, the modern school the development of children’s intellect «is more as a memory culture than a harmonious development of the intellect» and

The ideal school or, rather, the ideal upbringing and educational institution that I called the ‘Home of the Free Child’ and which should replace the modern school, will take its initial point in the development of the will through free action and through independent creativity, because will is the central fact of psychic life (*dushevnaia zhizn’*), thanks to which all this life receives unity and harmonious development, and at the same time is the crown and the highest point of the development of psychic life. Only cares about the normal development of the will can ensure the most complete and healthy growth and development of both the intellect, and the feelings, and in general of all the other aspects in the psychic life of the personality (*lichnost’*)⁴⁵.

Defining the goal of the «Home of the Free Child» as an ideal school, Venttsel wrote that its aim should be:

The liberation of the child and the delivery to the liberated child of all positive data for the development of his peculiar individuality (*individual’nost’*), his free personality, for the disclosure and fullest deployment of all the creative forces of life that are nodding in it⁴⁶.

Venttsel intended for the «Home of the Free Child» to be not simply a children garden, but rather an upbringing and educational institution, because in the first, study and learning (*ucheba, uchenie*) were in the forefront, whereas in the second,

⁴³ K.N. Venttsel, *Dom svobodnogo rebenka (Kak sozdat’ svobodniu shkolu)* [The Home of the Free Child (How to build a Free School)], Moskva, Kooperativnoe Izdatel’stvo «Zemlia i Fabrika», 1923.

⁴⁴ Hayashida, *The pedagogy of protest*, cit., p. 16.

⁴⁵ K.N. Venttsel, *Ideal’naia shkola budushechego i puti ege osushchestvleniia* [The ideal school of the future and the path to his foundation], in *Novye puti vospitaniia detei* [New path for children education], Moskva, Kooperativnoe Izdatel’stvo «Zemlia i Fabrika», 1923, p. 8.

⁴⁶ *Ibid.*, pp. 8-9.

upbringing (*vospitanie*) is brought to the fore, which means the whole human personality, and for this reason the intellectual education, or teaching, is included here only as a part, as a secondary and subordinate element. That is why, concerning the 'Home of the Free Child', here it can be not a matter of curriculum, but a *plan for life*, and I will try to outline this plan for life in general terms⁴⁷.

The pedagogue stressed that

we must look at the 'Home of the Free Child' as a small pedagogical community (*pedagogicheskaiia obshchina*) consisting of children, educators in charge and parents – a community that aspires in its system to be as close to the type of ideal society as possible, striving to realize as fully as possible in their lives the ideas of freedom, brotherhood and justice, since the more fully these ideas will be realized, the more favorable environment in the educational and educational aspect will that community offer, which have been called the 'Home of Free Child'⁴⁸.

Venttsel also noted that

socially necessary productive labor should play a paramount and basic role in the 'Home of the Free Child', and only when the proper attention is paid to this circumstance by the organizers of the 'Home of the Free Child', only then will the latter be the ideal environment in an upbringing and educational way. Only when the 'Home of the Free Child' creates a serious labor atmosphere, only then can we be sure that the development of those children who receive upbringing and education will go in a normal, healthy way⁴⁹.

The main thing for the organization of the educational process in the «Home of the Free Child» was the creation of conditions for preserving for each child complete spiritual independence, the maintenance of continuous self-activity (*samodeiatel'nost'*) in them, and the relentless awakening of their creative intentions (*tvorcheskii intencii*). So, for example, in reference to the organization of art classes, Venttsel pointed to the need to provide a free choice of themes and forms of work in accordance with the mental capacity and capabilities of pupils. The main obstacle to the practical implementation of the theory of free upbringing for Venttsel was the resistance among adults, for whom it was difficult not only to overcome established pedagogical stereotypes, but even more so to give up their power over children.

In order to raise funds for the implementation of the «Home of the Free Child», Venttsel promoted the creation of a «Society of Friends of Natural Education» at the end of October 1906 and referred to its activities during the meeting of the Moscow Technical Society entitled «Home of the Free Child», where he drew up a general plan for creating a new free school, later printed in the separate volume «How to create a free school».

⁴⁷ *Ibid.*, p. 9.

⁴⁸ *Ibid.*, p. 10.

⁴⁹ *Ibid.*, p. 13.

The «Home of the Free Child», a very original experiment carried out by Venttsel, incorporating some utopian aspects, was opened on October 1, 1906. Without a particular class structure, this kindergarten offered children complete freedom in acquiring knowledge, with teachers spontaneously forming classes or groups based on curiosity and knowledge needs. Teaching «will take the form of a free talk, a spiritual communication (*dukhovoe obshchenie*), free, unobtrusive, of an exchange of thoughts. The educator must be only a friend, an old companion, and to him the children turn to help», Venttsel wrote in his memoirs⁵⁰.

In the «Home of the Free Child» there were no programs or textbooks; the child had to actively search for knowledge – in a very spontaneous way, similar to little Émile by Rousseau –, and on the basis of the acquired knowledge he or she should create a book of knowledge or even a textbook. The task of the educator was to «liberate the creative energies (*tvorcheskije sily*) in the child by inspiring in him the spirit of knowledge, of recruitment, of creativity». The kindergarten should be an educational community (*pedagogicheskaja obshchina*) formed of children, parents and educators, united by the idea of brotherhood and justice. Initially, this educational experiment turned into a family kindergarten that would have to become a family school. Educational activity was organized around a theme, and during the lessons children elaborated on explanations with drawings, collages and various forms of manual work. During the first year, this kindergarten experienced a series of vicissitudes as a result of the closure of the associations on which it depended. Several measures to eliminate these shortcomings were taken, but in 1907 the situation changed somewhat.

Following the closure of the League of Education (*Liga obrazovaniia*), the Society of Friends of Natural Education also ceased to exist, and the organizers of the «Home of the Free Child» decided to organize a new society to support this institution under the name «The Circle of Co-education and Children's Upbringing». M.A. Gutsevich, one of the active participants in the organization of this «house», requested permission from the school district to open a kindergarten and a school of the third grade (*tretij razriad*). Subsequently, his aim was to reorganize and rename this children's garden in the «Circle of Co-education and Children's Upbringing».

After a year the «Home of the Free Child» was reopened under the direction of the parents, with the consequent creation of an educational office controlled by a rotating committee of the parents. This committee operated the institution, with parents teaching lessons with the exception of those in natural sciences and carpentry, for which paid teachers were employed. Parents and children worked together to clean, run the kitchen and library, and tend the garden. For younger children, an assistant was put in place. However, as there were

⁵⁰ Kistiakovskaia, Gorbunova-Posadova, *Opyt novoi shkoly «Dom svobodnogo rebenka»*, cit., pp. 78-83.

no teaching activities based on curricula and schedules, children learned to read discontinuously. It is likely that anarchy reigned, since no time was set for teachers to dismiss children from lessons. The parents became increasingly involved and the work activities were translated into the production of handicrafts⁵¹.

Despite all the positive aspects, a number of negative aspects became apparent as well during the first period of the existence of the «Home of the Free Child». These included the absence of an atmosphere of work, which should be the basis of all educational activities, and poor quality of organization of the productive work, which the children perceived as simply for fun. Since productive labor was unable to show the beneficial influence of free discipline that the founders expected from it, the children spent much of their time idly, not focused on any serious interests or content, and in many cases this resulted in a form of unbridled willfulness in which the child, as it were, lost consciousness of the need to respect the freedom of other children and the adults surrounding him or her and became a small despot. In reality, in many cases children's freedom meant they were abandoned inside the walls of the institutions. Due to the absence of any organized and systematic observation of the children's behavior, the lack of a planned and systematic response to these requests, many of the children, and especially the older ones, didn't receive the knowledge they needed to learn, and therefore they were largely dissatisfied.

The «Home of the Free Child» functioned for about three years before it was forced to close, due in part to material difficulties but also to a lack of agreement among the parents, some of whom had doubts about the new ways and methods of upbringing and feared that their children would miss out on opportunities to build a solid knowledge base for their further school careers⁵².

2d. *The principle of authority and its significance in life and upbringing*

In 1909, Venttsel published an article in the «Journal of Education» (Vestnik Vospitaniia) entitled *The Principle of Authority and Its Significance in Life and Upbringing*, in which he denied any positive effect of authority on the organization of the educational process. In this article, he showed the complete ineffectiveness of the principle of authority in the field of education, and in life in general.

Asserting that «the prevailing system of upbringing is based on the principle of authority, while the new one is based on the principle of freedom», Venttsel proposed that the main goal of pedagogical activity should be to promote the

⁵¹ *Ibid.*

⁵² Venttsel, *Iz perezhitogo-peredumannogo*, cit., pp. 217-218.

liberation of the child for free creative work on his personal upbringing. He associated this with overcoming a deeply rooted prejudice, the essence of which is that people can't live without subordination to one or another authority, that authorities constitute a necessary condition for the existence of any social life, that a group of people with big knowledge, the most intelligent, has the natural right to dominate and rule over the rest of humanity, who is below it from the intellectual point of view, and this rest of humanity must obey it. Hence the legitimacy of power in human society, on the one hand, and the legitimacy of the power of parents and educators over children and the younger generation, on the other⁵³.

Venttsel defined authority as the need to subordinate individual will and individual thinking to an external will, a subordination that is not violent, but voluntary and sanctioned by our consciousness. Recognizing in many cases the existence of authority as a natural necessity, Venttsel opposed the very possibility of its moral justification. «Always and everywhere morality was, is and will be to fulfill its higher will, but not to subordinate it to any other alien will, even if it was the will of all mankind»⁵⁴.

Neither the common good nor the possession of great knowledge, according to Venttsel, can justify authority. A person can also achieve some goals through the knowledge of others, because

if we recognize the authority of knowledge, we recognize at the same time the legality of the power of the adult generation over the young generation, and thus all ideas of 'liberating a child' will be no more than an ephemeral illusion⁵⁵.

According to Venttsel, in the sphere of ideas mankind should strive to put an end to the yoke of any authority, seeking to establish a realm of free thought and at the same time striving for liberation from the yoke of personal authority. He protests against the idea that it is impossible to achieve order in public life without subordinating the individual to authority. Thanks to the authorities, Venttsel stresses, mankind has created

only the culture of externally trained man; the culture concerns more material forms of existence and has an external, ostentatious character, but it does not yet know the culture of spirituality liberated from the whole invisible slavery of a man who freely and creatively generates all new and all higher forms of existence and life⁵⁶.

⁵³ Venttsel, *Princip autoriteta i ego znachenie v zhizni i vospitanii* [The principle of Authority and Its significance in life and upbringing], in Id., *Etika i pedagogika tvorcheskoi lichnosti*, cit., pp. 576-611, 574-575.

⁵⁴ *Ibid.*, p. 577.

⁵⁵ *Ibid.*

⁵⁶ *Ibid.*, p. 589.

There is an order that is based on strength and authority, but there is another order that is based on freedom. The first, according to Venttsel, leads to the submission of the will of one person to the will of another person, while the second leads to a union of people helping each other to realize their own will. He regards the problem of children's liberation as one of raising «the form of social relations that exist between the child and educators (parents, teachers, ecc.), from the type of subordination to the type of connection on equal principles»⁵⁷.

In November 1909, Venttsel criticized Tolstoy for asserting in his diary firstly that upbringing needed to be based on the authority of religion and morality, and secondly how education (*obrazovanie*) was conceived. Concerning the first element, Venttsel did not deny these two important elements, but he argued that they could not be considered the basis of free education because they were external goal. He stated that «Man is the creator of religion and morality, and if we want him to create the highest forms of religion and morality, we must free his development from the pressure of the lower forms of religion and morality». Concerning the second, Venttsel contradicted Tolstoy's idea that education meant the «transfer of knowledge», because, the thought instead that:

Education is not the transfer of knowledge, but is an independent conquest of knowledge. True education doesn't consist in transferring knowledge, but in helping children to acquire this knowledge independently, not to tell the children the answers to the questions that arise in their minds, but to help them independently seek answers to these questions. And Tolstoy looks at education from the point of view of filling children with all sorts of knowledge, but all the difference from the usual view of education that finds its application in the existing school is that Tolstoy would like to fill the souls of children with what he regards as true and valuable knowledge, necessary for a religious and moral life, and the existing school fills the souls of children with knowledge, which from the point of view of Tolstoy seems superfluous, unnecessary. Tolstoy stands on the same ground as his opponents, with whom he fights⁵⁸.

In 1912 the mayor of Moscow, N.I Guchkov, who was extremely dissatisfied with Venttsel's literary and social activities, moved him to the school department of the city public administration. Venttsel, who found himself in a very difficult material situation, continued to actively develop and promote the theory of free upbringing. In 1913, he made a presentation on *Free Upbringing and the Family* at the First All-Russian Congress on Family Education, which was held in St. Petersburg in which, he explained the features of free upbringing, which should concern three main aspects⁵⁹.

⁵⁷ *Ibid.*, p. 593.

⁵⁸ Venttsel, *Iz perezhitogo-peredumannogo*, cit., pp. 235-236.

⁵⁹ *Ibid.*, pp. 253-254; K.N. Venttsel, *Svobodnoe vospitanie i sem'ia* [Free education and family], in *Trudy Pervogo Vserossiiskago S'ezda po semeynomu vospitaniuu* (Peterburg 30-12-1912 – 6-1-1913) [Proceedings of the First All Russian Congress on family education (Petersburg, 30th december 1912 - 6th January 1913)], Sankt Peterburg, Tipo-Lit. N.L. Nyrkina, 1914, pp. 235-253; see also D. Caroli, *New insights into the history of child rearing within Russian and Soviet families*

The first aspect concerned the features of free upbringing, that should be conceived in a plurality of methods corresponding to the variety of children; upbringing doesn't mean to educate a child according to the educator's ideal, but a process of liberating the creative energies of the child according to the rules suggested by his personality; the main goal of education is the development in the child of a creative individuality, associated with the true public life and culture. True upbringing must have an active character that relies on the child's self-motivation and leads to higher activity. True upbringing should put the child in the closest possible contact with nature.

The second aspect deals with upbringing methods. In the field of mental development, attention must be given to the principle of mental activity or will in the broadest sense of the word in order to create a whole and harmonious upbringing. Based on mental activity in general, upbringing should lead to the greatest development of that higher form of activity, which can be called will in the narrow sense of the word, that is, the ability to set conscious goals for oneself and strive to achieve them. The cornerstone of upbringing (*vospitanie*) and education (*obrazovanie*) should be free creative productive work. In the field of moral and religious upbringing, the tasks should be limited to helping the child develop his or her own personal morality and personal religion. Any teaching of this or that moral code, this or that particular religion should be rejected. Children should have the right to be free seekers and creators of the higher spiritual values of life.

Finally, the third aspect regards the role of the family, which should be reorganized on a new basis in order to realize the true objectives of upbringing. The new family should be based on the principle of equality and equal liberty of children and parents. The relationship between children and parents should lose all shades of compulsion, and feelings between them should be manifested spontaneously. Within the new family, children should participate widely and creatively in the organization of family life and play an active role in defining its elements. Family egoism must give way to family altruism. The family should become a free union of children and parents in pursuit of their mutual spiritual and moral perfection⁶⁰.

During the Congress, Venttsel stressed the role of the family in the development of its new form, advocating the organization of parents' clubs that would

contribute to the quick realization of the idea of the 'new education' which fits with the child's nature and of development that proceeds in a natural way of the physical and

(1890-1940), «History of Education & Children's Literature», vol. VIII, n. 1, 2013, pp. 475-501.

⁶⁰ *Ibid.*, pp. 253-254.

spiritual life. Also inside the clubs the parents should receive the difficult task of educating children ‘on the basis of the freedom and of the respect of child personality’ and [...] the parents’ clubs also facilitate the creation of these unions of parents, having as their aim the reform of the family life in the spirit of the principles developed⁶¹.

Venttsel’s view was criticized because its educational methods lacked coherence.

In the same year, 1913, Venttsel wrote an article entitled *The reform of the modern school according Wilhelm August Lay’s views*, first published in the journal «Free Upbringing» in 1913-1914. In the article he criticized the German theory of actions, which considered human behavior in the context of reaction to the environment, while relying on the ideas of the American psychologist and pedagogue Edward Thorndike (1874-1949), a theoretician of behaviorism. Venttsel argued for the need to define the ideal school of the future not as the «School of Action», as defined by Wilhelm Lay (1862-1926), the German founder of experimental pedagogy⁶², but as the «School of Creative Action» or, better yet, the «School of the Formation of a Creative Personality», emphasizing and underlining in the concept of personality the harmonious unity of individual and social moments. Personality is inconceivable without a broad social life, without broad public relations, without solidarity in one form or another with the human being (chelovechestvo), and at the same time, only an original creative individuality (samobytnaia tvorcheskaia individual’nost’) can be a personality (lichnost’)⁶³.

World War I began in the summer of 1914. From the first days of the war Venttsel waged an irreconcilable struggle against the militaristic mood that engulfed Russian society.

⁶¹ *Ibid.*, p. 251.

⁶² See for example C. Hopf, *Die experimentelle Pädagogik. Empirische Erziehungswissenschaft in Deutschland am Anfang des 20. Jahrhunderts*, Bad Heilbrunn, Klinkhardt, 2004, pp. 19-34; P. Drewiek, *Entstehung und Transformation der empirischen Pädagogik in Deutschland im bildungsgeschichtlichen Kontext des frühen 20. Jahrhunderts*, in Ch. Ritzi, U. Wiegman (edd.), *Beobachten. Messen. Experimentieren. Beiträge zur Geschichte der empirischen Pädagogik/Erziehungswissenschaft*, Bad Heilbrunn, Julius Klinkhardt, 2010, pp. 163-193.

⁶³ K.N. Venttsel, *Reforma sovremennoi shkoly po vozzreniiam V.A. Laia* [The reform of the modern school according Wilhelm August Lay’s views], in *Novye puty vospitaniia i obrazovaniia detei* [The reform of the contemporary school according to W.A. Lay’s views], 2 izd. Moskva, Kooperativnoe Izdatel’stvo “Zemlia i Fabrika”, 1923, p. 113.

3. *Venttsel on the eve of the February and October Revolutions of 1917*

3a. *The theory of free upbringing and the ideal kindergarten*

In his book *The Theory of Free Upbringing and the Ideal Kindergarten* (1915), published in several editions, Venttsel gave a general description of the main theses of his eclectic theory of free upbringing⁶⁴, combining the educational ideas of very different foreign pedagogues. Like the European theoreticians of the *éducation nouvelle*, in the first pages Venttsel explained that the theory of free upbringing was the heir of a line of pedagogical thought associated with Michel de Montaigne (1533-1592), Jan Amos Komenský (1592-1670), Jean-Jacques Rousseau (1712-1778), Johann Heinrich Pestalozzi (1746-1827) and Friedrich Wilhelm August Froebel (1782-1852), but in the final references he listed works of philosophers and theoreticians of the new schools from which he drew the ideas of active education based on the interests of the child, creative education and productive labor, with particular attention paid to the age of the child⁶⁵.

In this regard, Hayashida argues that Venttsel

truculently denied that his child-centered pedagogy was simply an expression of the most extreme individualism, since there would be ‘a principled recognition of the basic harmony between the individual, the world, and mankind’. Free and creative production labor, according to his view, would promote the necessary harmonization of the individual, physically and spiritually, with all larger human collectives. Finally, in order to vitiate some of the disparaging criticism of his views, Venttsel claimed that the empirical conclusions of the then fashionable German progressives like Wilhelm August Lay (1862-1926), Ludwig Gurlitt (1855-1931) and Fritz Gansberg (1871-1950) buttressed his theoretical assertions⁶⁶.

Venttsel’s theories reflect the circulation of the ideas, on one side, of the pedagogy conceived by Stanley Hall (1844-1924) and of the founder of American activism John Dewey (1859-1952), whose works were translated into Russian⁶⁷, and on the other side of the “Home of the Free Child” opened by Maria Montessori (1870-1952)⁶⁸, whose works were well known in Russia

⁶⁴ K.N. Venttsel, *Teoriia svobodnogo vospitaniia i ideal’nyj detskii sad* [The theory of the free upbringing and the ideal children garden], Peterburg-Moskva, Golos Truda, 1923, 4 izd. The same work has been reproduced by Boguslavskii, Kornetov (edd.), *Venttsel*, cit., pp. 30-116.

⁶⁵ Duval, *L’éducation nouvelle dans les sociétés européennes*, cit., pp. 71-72.

⁶⁶ Kirschenbaum, *Small comrades*, cit., pp. 20-21.

⁶⁷ The methods of American progressive pedagogy also found rapid dissemination and were assumed as the basis of the new school curricula in Russia after the Revolution. See M. del Mar del Pozo Andrés, *The Transnational and national dimensions of pedagogical ideas: the case of the project method, 1918-1939*, «Paedagogica Historica», vol. 45, nn. 4-5, 2009, pp. 561-584.

⁶⁸ The birth of the *Casa del bambino* (House of the child), opened in Rome in 1907, has been analyzed by T. Pironi, *Percorsi di pedagogia al femminile. Dall’unità d’Italia al secondo dopoguerra*, Roma, Carocci “Studi superiori”, 2014, pp. 45-87.

at the beginning of the twentieth century. Venttsel's conceptions also reflect the work of the French psychologist Paul Lacombe (1834-1919), the Catalan anarchist Francisko Ferrer Guardia (1859-1909), the Latvian pedagogue and professor Aleksandr Dauge (1868-1937), the childcare educator Clara Ebert-Stockinger (1863-1949) and the Swiss educator Adolphe Ferrière (1879-1960); the representatives of the German *Reformpädagogik* tendencies, Ludwig Gurlitt and Fritz Gansberg; and, finally, the French philosopher Henry Bergson (1859-1941) and the Belgian journalist Jean-François Elslander (1865-1945)⁶⁹.

The book is subdivided into four parts: the general outlines of free upbringing; the organization of a kindergarten according to the theory of free upbringing; objections to the theory of free upbringing and responses to them; and the possible realization of the theory of free upbringing. The appendix includes a declaration of the rights of the child; the role of productive labor in free upbringing in the kindergarten (present only in the fourth edition); and a rich bibliography on free upbringing (concerning also translations into Russian of the works of European pedagogues).

The first part, which contains the key ideas on free education, reveals its political goals concerning humankind: the realization of children's rights within the family, condemnation of the militarism of society, and advocacy for free education that does not violate the «right of the personality», as contemporary systems of education were supposed to do. Indeed, he argued that pedagogy should take into account the principle of freedom in education, because:

The vital fact that gave impetus to the creation of the theory of free upbringing, this is the violence against the child's personality, which has to be observed everywhere [...] In the modern practice of upbringing, the child is almost never regarded as a self-sufficient goal, but always as an instrument and means for some external and tangential goal [...] Parents and educators who profess a certain ideal and who live within the framework of a particular social order, always strive to make the child the embodiment of their ideal, always strive to make from it a convenient member of the social order in which they live [...].

The true ideal of upbringing is to ensure the free development of the personality, to free the development of the child from all the bonds and paths that are usually imposed on this development [...] in order to make it independent of all religious, political and social factors, since these factors tend to bind this free development [...] Any system of upbringing, as a system, is a restriction of liberty both of the educator and of the pupil. Free upbringing does not imply uniformity, but the diversity of upbringing brought to the extreme possibilities, since each child assumes its own special educational system [...] ⁷⁰.

According to Venttsel, the educator should love the child and accept him or her as he or she is. The educator should observe the child, since the key to

⁶⁹ D. Hameline, *Adolphe Ferrière (1879-1960)*, «Perspectives: revue trimestrielle d'éducation comparée», vol. 23, nn. 1-2, 1993, pp. 379-406; Duval, *L'éducation nouvelle dans les sociétés européennes*, cit., pp. 71-86.

⁷⁰ Venttsel, *Teoriia svobodnogo vospitaniia i ideal'nyj detskii sad*, cit., p. 7; Boguslavskii, Kornetov (edd.), *Venttsel*, cit., pp. 41-47.

understanding the child is to observe the manifestations of his or her free activity, which reveal his or her true essence. Free upbringing cannot be understood as the deliberate formation of a child according to a certain ideal by the educator. The child with whom the educator deals is a living entity that develops according to its own laws, which are suggested by its individuality (individual'nost'). It is necessary to do everything possible so that the individuality of the child can unfold, on the basis of the liberation of the child's creative powers. Free upbringing prohibits any violence against the child.

The theory of free upbringing proceeds from the principal recognition of harmony between individuality on the one hand, and peace and humanity on the other. The task of upbringing is to help an individual child realize the natural solidarity that exists between him or her and humanity, between him or her and the world, and to turn this awareness into the starting point and basis of his or her subsequent life. It is necessary to do everything possible so that the individuality of the child can unfold, on the basis of the liberation of the child's creative energies. Social life (obshchestvennost'), the development of which proceeds from the development of creative individuality, is a free community of distinctive individual personalities. Creative individuality can't grow up without a broad awareness of what is given by culture; but the person must have the right to assimilate from modern culture only what her individuality requires.

Free upbringing has an active character, relying on the child's free activity in all its forms, gradually expanding it in relation to the development of physical and spiritual forces inside it. The theory of free upbringing demands integral, harmonious, all-around development of individuality and of the spiritual abilities inherent in it, but at the same time puts forward the principle that all life, including the spiritual, develops and is perfected only through free discovery⁷¹.

The beginnings of spiritual activity can be called «will» in the broadest sense of the word, and thus the theory of free upbringing puts the development of the will at the fore in the field of mental development; when the development of the will is advanced in a broad sense, and the intellect itself has experienced healthy and harmonious development, the emotional side of human nature is better developed. From the will in the broad sense, that of mental activity in general, it is necessary to distinguish the will in the narrow sense, as an activity in which the given person consciously sets him or herself goals and consciously strives to achieve them by means they have chosen.

The will, conceived in this way, is the highest form of activity the human being can achieve; it is the ultimate development of psychical activity (psikhicheskaia aktivnost') in the individual human personality. The child must learn, as early as possible, to consciously set him or herself goals and consciously strive to achieve them. Free upbringing should be based on the free, creative, productive

⁷¹ *Ibid.*

work in order to favour the freely and naturally intellectual life of the child, that is to lead to a true general education (*obrazovanie*) from within the child itself, and not imposed from the outside, as it was the case in Russian modern schools. A moral ideal must be created by each individual person for him or herself, and its realization must take the form of free, creative, productive labor that encompasses the entire life of the individual. The theory of free upbringing resolutely opposes the teaching of any firmly established, dogmatic code of morality to children, since true morality, that is, free morality, cannot be taught to children.

Religious education should not be aimed at introducing one or another orthodox religion to children. It should only help the child find his or her own creative path to religion by providing as much information as possible on the history of religions and the various diverse forms of religion around the world. The more the child's education and life are built around him or her feeling like a member of a more or less broad creative social group striving for the spiritual renewal of life, the more he or she will seek its spiritual perfection⁷².

Furthermore, Venttsel stated that free upbringing is based on the rejection of violence toward the child, intended «as human personality which conditions the individuality», and he criticized the intellectual approach toward the child, referring to Bergson, who argued in his work *Évolution créatrice* (1907) that the «intellect is characterized by the congenital incomprehension of the life» because it normally deals with inanimate beings. According to Venttsel, the task of pedagogy was «educating the creative individuality of the person, whose creative energies, determined by his particular individual character, are developed up to the boundaries of possibility»⁷³. Free upbringing should not be hostile to culture, since it is an important instrument of development of the primitive human personality, but it should have an active character and be organized in conjunction with nature according to Rousseau's pedagogy⁷⁴. The upbringing of the child should consider the need for the «omnilateral harmonious development of individuality, and the development of spiritual capabilities»⁷⁵. The principle of the harmonious development of the entire spiritual life is closely connected with the development of the will, considered as «the element of the spiritual life thanks to which all elements are strictly linked between themselves in a particular individual whole»⁷⁶. In this sense the will is the highest form of activity and the «crown of the development of the activity in the human individuality of the person»⁷⁷.

⁷² Venttsel, *Teoriia svobodnogo vospitaniia i ideal'nyj detskii sad*, cit., pp. 6-7.

⁷³ *Ibid.*, p. 11.

⁷⁴ *Ibid.*, pp. 14-15.

⁷⁵ *Ibid.*, p. 16.

⁷⁶ *Ibid.*

⁷⁷ *Ibid.*, p. 17.

Furthermore, in his thought, labor and morality are closely linked. For Venttsel, creative productive work represents one of the key elements of free upbringing because it requires the setting of a goal and the means for its realization, as already described. Furthermore, moral education should aspire to «creatively elaborate and define the moral values of life also through free creative labor»:

the moral ideals have to be created by each different personality for herself as her personal particular task, and their realization has to assume the form of free creative labor, extending throughout the life of the person, and in relation to which the different works and matters realized by the person constitute only partial accomplishments of the general moral task⁷⁸.

Religious education, which was not excluded, should be free and should not have the aim to inculcate a particular religion, but «to help the child to attain his very religion by his creative means». According to Venttsel, one of the more important ways to achieve high spiritual values in life is to extend «the free creative spiritual reciprocity of the child with the persons surrounding him in the sphere of searching for these values, their creation and realization in life»⁷⁹.

According to Venttsel's conception, for this reason the theory of free upbringing implies a «new family» and «the aspiration to reconstruct the old family on new principles». In the contemporary family, which is not free, the child is a slave and the parents slave-traders, and the principle of equal rights does not exist. Children's rights should be considered equal to those of their parents, and the family should be a free union of its members. Venttsel continued that «the theory of free education recognizes the rights of children to choose their closer educators and renounce and abandon their parents, if they are bad educators». Venttsel was aware that this would require the extensive reconstruction of society on a new basis, and in consequence: «The natural basis of the family unit should be considered the reciprocal love and reciprocal respect of one toward the other, a completely uncompulsory need in the spiritual and harmonious fusion with the other», and this can only be realized if all family members have the same rights⁸⁰. Venttsel's idea about the family and children's rights assumed that «the child should have the right to feel what he wants to feel and to research freely his feelings, even when those feelings are unpleasant for children»⁸¹. In terms of the crisis of the family as discussed by other pedagogues at the beginning of the century, Venttsel idealized the family, arguing that «the family of the future will be a free cooperative of children and parents in the project of reciprocal spiritual and moral improvement»⁸².

⁷⁸ *Ibid.*, p. 19.

⁷⁹ *Ibid.*, p. 21.

⁸⁰ *Ibid.*, pp. 22-23.

⁸¹ *Ibid.*, p. 23.

⁸² *Ibid.*, p. 25.

Indeed, as Lisa A. Kirschenbaum has noted,

Venttsel believed that the organisation of such a community required a simultaneous grant of equal rights to the child at home. World War I's 'economic and moral jolt to family life' added compelling reasons for making the kindergarten part of a children's home that could become a child-centered community in advance of remaking family life.

Venttsel also imagined that the free kindergarten would provide a model for the reform of the family. «The family of the future», Venttsel predicted, will be a free cooperative of children and parents in the work of spiritual and moral perfection. Not only will parents raise their children, but children will raise the parents»⁸³.

This vision of the family was important for the new conception of the parental role in education elaborated after the October Revolution.

3b. *The Revolution and the Declaration of the rights of the child (1917)*

The year 1917 was one of revolutionary upheaval in Russia. As a result of the February Revolution, the tsarist autocracy was destroyed and the Provisional government, along with the Petrograd soviet, established a new government. As a result of the October Revolution, the Bolsheviks came to power in Russia. Venttsel later recalled: «The year 1917, the year of our two revolutions – February and October, came. And I also aspired to the best of my ability to take part in the general revolutionary movement that engulfed Russia, and to exert some ideological influence on its course. For me, one of the first and most important aspects of the revolution was, apart from the social upheaval and the construction of a new society, in which wage labor and the system of capitalist economy would be absent, the need to seek the separation of the school from the state and the proclamation and implementation of the Declaration of the rights of the child»⁸⁴.

On April 14, 1917, in his report at the open meeting of the «Circle of Co-education and Children's Upbringing», Venttsel formulated his ideas on the separation of the school from the state. Venttsel argued firstly that the school should not serve as an instrument for carrying out these or other transient political tasks; secondly, no public schools should receive special protection, privileges or advantages from the state, and for this purpose the school should be separated from the state; thirdly, schools must be independent, self-governing, accessible and free for people at all grades (higher, middle and higher) and be in the hands of self-governing bodies (communities or free associations); fourthly,

⁸³ Kirschenbaum, *Small Comrades*, cit., p. 22.

⁸⁴ Venttsel, *Iz perezhitogo-peredumannogo*, cit., p. 283.

the school should be freely created through the free association of its constituent elements – students, parents and teachers; fifthly, student organizations should play an increasing role in the transformation of the school on a new basis. Any serious reform initiative was to receive great attention and material support from the public education fund.

On September 25, 1917, Venttsel wrote the *Declaration of the Rights of the Child* (Deklaracija prav rebenka)⁸⁵, which was probably aimed at considering the child a person and not simply a subject of the new state. Indeed, the Soviet State was organizing a very complex system of welfare assistance in order to protect all categories of minors in precarious conditions and at risk, inside and outside the family⁸⁶.

Venttsel demanded the eradication of enslavement and inequality based on age differences between adults and children. Because the *Declaration of the Rights of the Child* is extremely important for understanding Venttsel's concepts, the full text was published by the author in the appendix to the third edition of *The Theory of Free Upbringing and the Ideal Kindergarten* as following⁸⁷:

1. Every child born to the light, whatever the social situation of his parents, has the right to exist, that is, he must be provided with a certain set of living conditions, as it is established by the hygiene of childhood, necessary for the preservation and development of his organism and for the latter's successful struggle against hostile influences.
2. Concern for the delivery of life conditions to children required for the hygiene of the child's living conditions rests on the parents, on society as a whole, and on the state. The role of each of these factors and their mutual relation in the matter of delivering these conditions to the child are determined by appropriate legal regulations.
3. Every child, no matter what age he is, is a certain person and in no case

⁸⁵ This document, published in 1923, was much more radical than the *Declaration of the Rights of the Child* adopted 42 years later at the 841st plenary meeting of the United Nations General Assembly (Resolution 1386). For the history of children's rights see Z. Moody, *Transnational treaties on children's rights: Norm building and circulation in the twenties century*, «Paedagogica Historica», 50, nn. 1-2, 2014, pp. 151-164; I. Jablonka, *Social welfare in the western world and the Rights of children*, in P.S. Fass (ed.), *The Routledge History of Childhood in the Western World*, London and New York, Routledge, 2013, pp. 360-399.

⁸⁶ See for example the collections of regulations concerning children's rights in Soviet Union, *Detskoe pravo Sovetskikh respublik. Sbornik deystviushchego zakonodatel'stva o detiakh* [Children's right of the soviet Republic. Collection of children legislation in force]. Pod red. Yu.P. Mazurenko, Kar'kov, Izdanie NKU ESSSR, 1927. To this regard see D. Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, Préf. de Jutta Scherrer, Paris, L'Harmattan, 2004, pp. 12-14.

⁸⁷ K.N. Venttsel, *Provozglashenie Deklaracii prav rebenka* [The proclamation of the Declaration of the rights of the child], in Id., *Teoriia svobodnogo vospitaniia i ideal'nyj detskii sad* [The theory of the free upbringing and the ideal children garden], Petrograd, Moskva, Izdatel'stvo "Golos Truda", 1923, 3-izd., pp. 89-92.

can be considered either the property of his parents, or the property of society, or the property of the state.

4. Every child has the right to choose his closest educators and to refuse and leave his parents if they turn out to be bad educators. This right of withdrawal from parents belongs to the child at any age of his life, and the state and society must take care that no changes in this respect result in a deterioration in the material conditions of the child's life.
5. Each child should be guaranteed the free right to the development of all the forces, abilities and talents inherent in him, that is, the right to upbringing and education (*vospitanie i obrazovanie*), in accordance with his personality. The realization of this right must be guaranteed as a free opportunity for him, at all ages of his life, corresponding to the upbringing and educational institutions, wherever all aspects of his nature and character receive the most favorable conditions for his harmonious development.
6. No child can be forcibly coerced into attending one or another upbringing or educational institution. Upbringing and education at all levels are a free choice of the child. Every child has the right to refuse upbringing and education that runs counter to his personality.
7. Every child, from the age when it becomes possible for him, has to participate in socially necessary, industrial, agricultural or any other productive work, in the amount determined by his forces and abilities. This work, however, not only should not harm the physical health of children or interfere with their spiritual development, but must merge into one whole with the entire system of upbringing and education of the people. Specific areas of land should be set aside, special workshops organized or any other institutions set up for other possible types of socially necessary labor, closely linked with upbringing and educational institutions for children. The organization of such places for socially necessary labor will make it possible to realize one of the most sacred rights of the child, that is, not to feel like a parasite; and to realize that he partially contributes to paying for social expenses for his upbringing and education and for preserving his life, and, most importantly, to have the consciousness that his life can have social value not only in the future, but has it already in the present, where he is already a participant and builder of public and social life.
8. A child at all ages of his life, in his freedom and rights, is equal to an adult man. If these or other rights are not realized by him, this should be caused only by the lack of physical and spiritual forces necessary for the exercise of these rights. With the presence of these rights, age should not be a restriction on the use of his rights.
9. Freedom consists in the ability to do everything that does not harm the physical and spiritual development of the child and does not harm other people. Thus, the enjoyment of each child's natural rights should not face other boundaries, except those that are suggested by the laws of normal

physical and spiritual development of the child himself, and other than those that guarantee to other members of society the enjoyment of the same rights.

10. This or that group of children in their mutual relations between themselves and in their relations to adults around them can be subordinated to the rules prohibiting actions that harm the public and social whole. All that is not prohibited by these rules should not encounter obstacles to its implementation. No children should be compelled to do what is not prescribed by these rules.
11. The rules to which this or that group of children and the common life of adults are related should be an expression of their common will. All children should be given the right to participate in the drafting of the rules governing their life and work. Whatever these rules, they should be the same for everyone, both for children and for adults connected with them, provided they do not run counter to the requirements of social justice.
12. No one, neither parents, nor society, nor the state, can coerce a child to learn a particular religion or enforce its rites.
13. No child should be constrained by his beliefs, so long as their manifestations do not violate the equal rights of other members of society, adults and children.
14. Each child is free to express in writing or orally his opinions and thoughts to the same extent that adult people also use this right, that is, with only those restrictions that are dictated by the good of society and its constituent persons and which must be precisely established by law.
15. Each child enjoys the right to form with other children or adults those or other unions, circles and similar social unions in the same measure as this right belongs to adults. Undoubtedly, it is forbidden to form such unions that pursue goals and tasks that contradict the true interests of the child and his normal physical and spiritual development, and also in one way or another harm society in its entirety or its constituent persons. These cases must be precisely regulated by the law.
16. No child can be imprisoned, except in cases specified by law, when the welfare of the child and the surrounding society requires it. Also, no child can be subjected to any punishment. The misdemeanors and shortcomings of the child must be addressed with the help of appropriate educational institutions, through education or treatment, and not by punishment or other sorts of repressive measures.
17. The state and society must, by all means, ensure that all the rights of the child listed in the preceding paragraphs are not subjected to any diminution. They must protect these rights from any attempts to deny them, and all those who do not fulfill their duties in relation to the younger generation must be compelled to do so.

18. For the real realization of the rights of the child, a special *fund for the young generation* must be established, sufficient to prevent the rights of children from being diminished in any way. This fund can be formed by establishing a special tax or by deduction from general state funds. Expenditures made from this fund must be under strict public control⁸⁸.

3c. *Venttsel and cosmic pedagogy*

In the period 1919-1922 Venttsel lived in Voronezh, and then again returned to Moscow. He continued to work actively, but his writings in no way reflected the Soviet conception of the communist «New Man» or of the reform of mass education⁸⁹. The new government was building an educational system aimed at the formation of a young generation of communists but, after the revolutionary period, it transformed the school into an instrument of industrial modernization in the country⁹⁰.

After the revolutionary events of 1917, Venttsel developed the concept of cosmic education (cosmic upbringing), which was a synthesis of the ideas of free development of human individuality in a freely united society at the planetary level⁹¹. He interpreted the personality as an integral part of a comprehensive holistic cosmos (*vseob'emljushchij celostnyj kosmos*), which proceeded from the indissolubility and organic unity of man, humanity and the universe, following the logic of such outstanding Russian thinkers as V.I. Vernadsky, V.V. Dokuchaev, N.F. Fedorov, K.E. Tsiolkovsky and A.A. Chizhevsky, but also recalling the ideas of the theosophical fraternity in education which circulated by means of the New Education Fellowship (NEF) congresses⁹².

Venttsel made the first step in developing the ideas of cosmic pedagogy in «Religion of Creative Life», the redaction of which was largely stimulated by the violence of World War I and the revolutionary catastrophe that broke out in Russia. The first version of this fundamental unpublished work was prepared in 1918, and the completed text dates to 1923⁹³.

⁸⁸ *Ibid.*

⁸⁹ See for example E.M. Balashov, *Shkola v rossiiskom obshchestve, 1917-1927 gg. Stanovlenie novogo cheloveka* [The school in the Russian society, 1917-1927. The birth of the *new man*], Sankt Peterburg, Dmitrii Bulanin, 2003.

⁹⁰ L.E. Holmes, *School and Schooling under Stalin, 1931-1953*, in B. Eklof, L.E. Holmes and V. Kaplan (edd.) *Educational reform in Post-soviet Russia. Legacies and prospects*, London and New York, Frank Cass, 2005, pp. 56-101.

⁹¹ K.B. Kornetov, M.V. Boguslavskii, *Kosmicheskaia pedagogika Kostantina Venttselja* [The cosmic pedagogy by Konstantin Venttsel], in G.B. Kornetov (ed.), *Svobodnoe vospitanie* [Free Upbringing], «VLADI. Pedagogicheskii Al'manakh», vol. 2, 1993, pp. 14-19.

⁹² Bregony, *A New Education for a New Era*, cit., p. 736.

⁹³ *Ibid.*, p. 744. His ideas recall the title of the New Education Fellowship congress held in

Refusing to understand or accept violence by some people against others, Venttsel came to the conclusion that it was necessary to create a new religion, which he called the Religion of the Creative Developing God – the One Whole Life and the Universe (Edinaia Celostnaia Zhizn' i Vselennaia). Treating the new philosophy of religion as a creative biography, as the life-feeling and life-aspiration of a spiritually liberated person who admits an infinite variety of individual forms of expression, he stressed that this religion denied any kind of dogmatism.

According to Venttsel's plan, a new religion was to be built on the whole, single, harmonious consciousness of a free creative personality (lichnost') expanding in all directions, reaching its greatest possible expression and depth. This religion did not require the establishment of any church intended as a special form of social union of persons professing it. This religion was supposed to have an anticlerical character (anticerkovnyj karakter), because the church and everything that resembles it in spirit, according to Venttsel, is nothing more than a kind of organized spiritual violence against human souls. In connection with this, he developed the ideas of the Cult of the One Whole Universe with the creative evolution of life inside it, of the Cult of the One Creative Humanity, leading to the progressive realization of higher moral and universal ideals. According to Venttsel's concept, the cult was to be the decoration (oformlenie) in which a new creative biography (tvorzheskoe zhizneopisanie) would receive its symbolic expression.

While elaborating the psychological and pedagogical foundations of the new religion, Venttsel argued that in the Cult of the Creative Personality, the child would play the most important role, because the child is the person through which the life of mankind constantly maintains the character of freshness and the fragrance of youth.

Reflecting on the need to restore the unity of the personality of each individual with that of other people, with humanity as a whole, with the universe, Venttsel saw the need to attain ever more perfect forms of unity, wholeness and harmony. And he continued that:

The single integral harmonic consciousness becomes more and more the foundation on which the field of knowledge is built, both in the sphere of the moral activity of man, and in the field of the knowledge of the beautiful, and in his religious creativity, and in his transformations of the forms of the social life of Mankind and influence on the historical course of its development. Everywhere [...]. Only a small minority among Mankind (chelovechestvo), and even then in an overwhelming number to a weak degree, began to enter into this third stage of the development of consciousness, only a few began to outline the development of the Cosmic Consciousness and the higher forms of Consciousness of Mankind [...]. To achieve this, a radical revolution in the upbringing and self-education of both young

Montreux in 1923, *Education for Creative Service*, and he may have been in contact with some of the Russian participants at this congress, see Boyd, Rawson, *The story of the New Education*, cit., pp. 78-79.

and adult generations is required [...]. We need to make upbringing free and we need to make the individual human personality a goal, harmonious and united as a foundation and supreme goal. [...] And the intellect should not be put forward in the first place, as now, but it must be assigned that role which does not lead to a violation of the unity and integrity of consciousness. Next to it, the culture of feeling, the culture of the emotional side and the culture of the will must occupy the same place [...]. And with education in general, and with each individual educational step, with every individual educational measure, one should keep in mind the whole person, and also the development of her consciousness to more and more perfect forms of unity and harmony. But this single harmonic consciousness in a person can only be cultivated if, in parallel with this, it is growing the consciousness of the unity, wholeness and harmony of the developing individual life with the developing Life of the Universe and with the evolving Life of humanity⁹⁴.

In an article entitled *Problems of Cosmic Education* (1925), Venttsel developed the ideas outlined in the manuscript *The Religion of Creative Life*, which substantiated the need for special cosmic education, which, in his opinion, must exist equally along with individual and social upbringing. In this regard, he wrote:

We are talking about social upbringing, about the upbringing of a person as a member of society, and in pedagogy there has even emerged a whole current called 'social pedagogy'. But man is not only a part of some social whole, whether this whole be called a family, a people, a class, or humanity. He is also part of the whole called the universe or cosmos, which we could also consider as a kind of universal society embracing in itself all beings, staying only at different stages of development. The fact that a person represents a part of the cosmos is a fact that one must somehow reckon with, and if we are talking about the upbringing of a person as a member of a more or less wide human society, it is also perfectly legitimate to talk about the upbringing of a person as a member of the cosmos, as a citizen of the universe [...].

Cosmos, too, like society, implies a community of life between persons that we might call its constituent parts. One of those components is the human being, who is being educated, and is also his educator [...] If the highest goal of individual education is the most complete and broad development in the pupil of personal consciousness, the highest goal of social education is the education of social consciousness inside it, then similarly with this and the supreme task of cosmic education will be the development in it of cosmic self-consciousness as an inseparable part of the cosmos. The goal of individual education is to make the individual (individuum) aware of his personal life, of its integrity as a unity [...]. The goal of social education is that the individual should realize his unity with a certain social group, which is increasingly expanding in size and rising in its development to higher and higher forms. In the final process this social form has become the whole of mankind. Similarly, one can say that the goal of cosmic education consists in bringing the pupil to the consciousness of the communion (obshchnost') of his life with the cosmic life, to the consciousness that he, together the whole cosmos, is one single indivisible whole that develops in some direction,

⁹⁴ K.N. Venttsel, *Psikhologicheskie i pedagogicheskie usloviia tvorchestva novoi religii* (*Fragment glavy iz rukopisi Religiiia Tvorcheskoi Zhizni*) [Psychological and pedagogical conditions for the creation of the new religion (Fragment of the manuscript *The religion of the Creative life*)], in G.B. Kornetov (ed.), *Svobodoe vospitanie* [Free Upbringing], «VLADI. Pedagogicheskii Al'manakh», vol. 2, 1993, pp. 3-4.

and that he, whether he wants this or not, somehow takes some part in this process of development of cosmic life. The basis of individual education is the natural unity of the life of the individual human personality; the basis of social education is the natural unity of life of this human personality with the surrounding human society of more or less wide dimensions; the basis of cosmic education is the natural unity of the life of the person being brought up with the life of the entire infinite cosmos. To make this unity conscious, to the greatest extent possible, is the goal of education in all three analyzed cases noted⁹⁵.

3d. *Venttsel's philosophy of creative will as a precursor to post-communist pedagogy*

Venttsel died in Moscow in 1947, 90 years old. The period from the 1930s to the 1940s meant for him poverty and oblivion. He continued to work, without the slightest hope of publishing his texts, although it was at this time that he wrote such outstanding works as the *Philosophy of Creative Will* (*Filosofia tvorcheskoi zhizni*, 1937) and *The Rays of Light on the Path of Creation* (*Luchi sveta na puti tvorchestva*, 1937).

The Rays of Light on the Path of Creation, published only in 1993, ended with these words:

To the one who wants to successfully follow the path of creativity and liberation from the chains of invisible slavery, while not withdrawing from the road that stretches before him and not being forced to move and retreat sometimes, one can only say: (1) Hold fast for your Higher 'SELF', eternal and immortal; (2) Listen only to the voice of free creative consciousness; (3) Direct your spiritual eyes to the most ideal, to the most elevated things, that you can only imagine, to what is still invisible by bodily eyes, to that which does not yet have being and form, but which must necessarily be realized and finally be realized in coming in all its marvelous beauty, in all its splendor, in all its truth and justice. Let this faith inspire you, and let it in times of distress, despair and grievous trials that life brings to us at the present time, give peace and peace to the reeking and exhausted souls!⁹⁶.

Venttsel felt oppressed by Soviet reality and especially by Stalin's terror and repression and the lack of opportunity to openly express his thoughts, as emerges from surviving records in his diary. In 1936, at the age of 79, he experienced a last surge of hope for some change in Soviet social life in connection with the publication of the draft constitution of the USSR. Venttsel wrote a letter to the newspaper «Izvestia» in which he argued for the need

⁹⁵ Venttsel, *Problema kosmicheskogo vospitaniia* [The problem of cosmic education], in Kornetov (ed.), *Svobodnoe vospitanie*, cit., pp. 9-13, 10, 12-13.

⁹⁶ K.N. Kornetov, *Luchi sveta na puti tvorchestva* [Rays of light on the path to creation], in K.N. Venttsel, *Svobodnoe vospitanie: sbornik izbrannykh trudov* [Free Upbringing: Collection of selected works]. Sost. L.D. Filonenko, Moskva, Assotsiatsiia "Professional'noe obrazovanie", 1993, pp. 149-156 (see pp. 155-156).

to build an education system based on the spirit of ideas of autonomy and freedom, and the organization of school self-government at all levels in order to avoid any pressure from the state. In addition, he proposed to give all citizens «the right to free criticism of the supreme law and government agencies and individuals», without fear of being declared an enemy of the people.

Moreover, he fought for the unconditional abolition of the death penalty and for the replacement of places of imprisonment with institutions that would be aimed not at avenging and punishing but at re-educating, and demanded «an amnesty for all political criminals currently in detention and exile». It remains a mystery why Venttsel was not arrested after sending this letter⁹⁷.

The theory of free upbringing was actualized in Russia in the 1990s. It was in many respects consonant with the ideas of the American psychologist and pedagogue Carl R. Rogers set forth in the book *Freedom to Learn* (1969), considered as a basis for the thought of representatives of anti-pedagogy and critical pedagogy, which became widespread in the West in the second half of the twentieth century. In Russia in the late 1990s and the early 2000s, the pedagogy of freedom was elaborated and became the successor and continuation of the traditions of free upbringing.

The modern Russian pedagogy of freedom, which has been developed by O.S. Gazman, G.B. Kornetov, N.B. Krylova, A.N. Tubelsky and I.D. Frumin, denotes the following long list of main factors and principles:

- the conviction that a person from birth has an immanent activity, a desire for creativity, a huge positive potential that requires development;
- the aim of unconditional acceptance of each child as he or she is, based on the need to respect him or her;
- the desire to understand the child and the recognition that this is possible only if he or she is granted freedom;
- the relation to childhood as a valuable period in the life of each person, the value of which in principle cannot be reduced to the preparation of the child for a future “full” adult life;
- the recognition that the basis for the full-fledged development of the person is: the free development of the world around him or her, the active accumulation of his or her own experience, the independent acquisition of which must ensure both the realization of the potential of the child and his or her entry into the life of society, the mastery of culture;
- the comprehension of education and training as the most individualized way to develop the child’s internal potential by creating for him or her special pedagogical conditions, an educational environment that supports and stimulates the natural growth of a person and is as close to real life as possible;

⁹⁷ G.B. Kornetov M.V. Boguslavskii, *Prorok svobodnogo vospitaniia* [The prophet of the free upbringing], in Kornetov, Boguslavskii (edd.), *Venttsel*, cit., pp. 5-29 (see p. 28).

- the desire to organize the pedagogical process “proceeding from the child” on the basis of the most thorough study both of the general laws of the physical, mental, social, moral development of children, and of the characteristics of each individual person (health and experience, needs and abilities, interests and desires), and of his or her social environment;
- the exclusion of the possibility of any violence towards children as participants in the pedagogical process, the recognition by their full-fledged subjects of the processes of upbringing and education, and by equitable employees of their mentors in education;
- the establishment of the provision of maximum freedom for children in education, while creating the conditions for the formation of a responsible attitude to his or her actions in each child, the ability to make choices and to understand their possible consequences;
- the desire to organize a space for the life and development of children in such a way that they learn the value of freedom, and learn to live in freedom;
- the definition of the role of the teacher (educator) as a collaborator and assistant to the child, the organizer of the environment in which children live, develop their potential, accumulate life experience as a person supporting their activity and promote awareness of their problems and search for ways and means to solve them⁹⁸.

Conclusion

The analysis of the evolution of K.N. Venttsel’s theories reveals some important phases connected with Western European debates that sought to renew educational institutions and improve the condition of childhood by proclaiming the rights of the child. Many of his ideas constituted a rich source for the educational concepts and experiments carried out after the October Revolution⁹⁹.

Venttsel can be considered one of the more important representatives of the new school movement in Russia, and his theories, fundamentally based on an eclectic mix of Russian Tolstoyism and American activism, reflect the extraordinary circulation of many ideas of the new education movement and

⁹⁸ G.B. Kornetov, *Pedagogicheskie idei K.N. Venttselja i S.N. Durylina v kontekste tradicii vospitaniia k svobode* [Pedagogical ideas by K.N. Venttsel and S.N. Durylin in the context of the educational tradition in relation to freedom], in Kornetov (ed.), *Svobodnoe vospitanie v Rossi*, cit., pp. 41-42.

⁹⁹ L.H. Holmes, *Shatsky: Reformer and Realist (Introductory Remarks to F.A. Fradkin’s Shatsky’s Last Years*, in Eklof (ed.), *School and Society in tsarist and Soviet Russia*, cit., pp. 149-153; F.A. Fradkin, *Soviet Experimentalism Routed: S.T. Shatsky’s Last Years*, *ibid.*, pp. 154-175.

of the New Education Fellowship, which was in decline. The reason for this decline has been described by Kevin J. Brehony, who argues:

The NEF was a charismatic social movement that attracted the support of social and political radicals as well as mainstream liberals. It was international in outlook and deeply committed to world peace and the League of Nations was a way to attaining it. The worsening political conjuncture of the 1930s brought about by the coming to power of Stalinism, Nazism and Fascism together with, in England, an increased participation in the NEF by members of the academy brought about a change in the 'basic faith' of the NEF and a retreat from previous radicalism¹⁰⁰.

Although the new schools largely ceased their activities with the advent of totalitarianism, and many of its members were forced into exile, many of their principles provided fertile ground from which to restart democratic education after World War II. Venttsel's commitment to formulating a declaration of the rights of the child allowed children to acquire the right to education and to become citizens through the school. He may have contributed, in ways unrecognized until now, to the United Nations Convention on the Rights of the Child.

His pedagogical thought has been influential, because his ideas were rediscovered in Russia in the 1990s and have contributed to a renewal of Marxist pedagogy in seeking new values for the development of the child and the human personality in a free and democratic post-communist society.

¹⁰⁰ Brehony, *A New Education for a New Era*, cit., p. 754.

Syrian protestant college in american missionary archives (1866-1886)*

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ABSTRACT: During the 19th century, many foreign-run schools were opened by missionaries throughout the Ottoman Empire. In Anatolia, Protestant American missionaries alone opened more than 400 schools. American Protestant missionary schools have historical importance owing to their contribution to modern education in the Ottomans and elsewhere around the world. Syrian Protestant College was opened in 1866 and became one of the most prominent schools in the Ottoman Empire. It was given special emphasis by American Protestant missionaries. This study examines the first 20 years of the College's history, consulting American Board Archives and relevant historical-educational sources. The purpose is to compare it to other American schools in Anatolia in order to bring a new perspective in the field of history education.

EET/TEE KEYWORDS: History of Education; Missionary schools; American Protestant colleges; Syria XIXth Century.

Introduction

Throughout history, Syria was known by various names. The Egyptians referred to the area as Retunu; Muslims knew it as «Şam» or «al Şam»; and Arabian sources used the name Şam or Dimaşk. The official name Syria finally emerged during the French mandate¹.

In the Ottoman era, the region which covers today's Syria, Lebanon, Jordan, Israel and Palestine was known as «Bilad el Şam»². During the

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¹ O. Osman Umar, *Syria under Ottoman Rule and French Mandate (1908-1938)*, Ankara, Atatürk Research Center Publications, 2004.

² P. Gurson, *Turkey Syria*, Ankara, Atılım University Publications, 2010.

Ottoman Reformation period *Tanzimat*, Syria was divided into the provinces of Damascus, Aleppo and Sayda, with Beirut being a part of Sayda. Syrian Protestant College, which later became known as the American University of Beirut, was located in the Beirut district of Syria according to the Ottoman land division.

Syrian Protestant College was founded and overseen by American missionaries who started their activities in the Near East from 1820 onwards on behalf of the American Board of Commissioners for Foreign Missions³. Fathers Pliny Fisk and Levi Parsons established the Syria mission, followed by the establishment of the Beirut Station with the efforts of Mr and Mrs Goodell and Bird three years later in 1823⁴.

American missionaries attached particular importance to Lebanon, Syria and Palestine. In order to influence Arabic culture, Protestant missionaries prioritized Protestantization activities in the region. They learned and printed prayer books in Arabic. In 1834, they moved their printing center from Malta to Beirut and accelerated their printing of Protestant materials. In 1849, Eli Smith started to translate the Bible into Arabic, an effort which was completed in 1864 by Dr Cornelius V. A. Van Dyck. Educational activities for Evangelical studies in Syria and Lebanon were among the most valued ventures of American missionaries⁵.

The American Board of Commissioners controlled Syrian Protestant College via the Syria Mission⁶. In 1861, the mission was organizing 8 outposts, the first of which was in Beirut. Missionaries in this station included William M. Thomson and C.V.A. Van Dyck. The outpost in Abeih had missionary Simeon H. Calhoun. The one in Suk el Ghurb had missionary Daniel Bliss; the one in Sidon had J. Edwards Ford; and the one in Hasbeiya had a preacher. In Deir el Komr there were six teachers working for the American missionaries, while in Tripoli Henry Harris Jessup and J. Lorenzo Lyons were stationed. In Homs, the eighth station of the Syria Mission, David M. Wilson was the missionary⁷. As Syrian Protestant College was being founded, American missionaries

³ American Board of Commissioners for Foreign Missions is a missionary organization running the global activities of American Protestant Missionaries. For more detailed information, see: U. Kocabaşoğlu, *The America in Anatolia*, Ankara, Imge Publications, 2000; Ömer Turan, *Missionaries in Eurasia*, Ankara, ASAM, 2002; Ö. Yıldız, *American Missionaries in Anatolia*, İstanbul, Yeditepe Publications, 2015; E. Açıkşes, *Missionary Activities of Americans in Harput*, Ankara, TTK, 2003; Ç. Erhan, *The Historical Origins of Turkish American Relations*, Ankara, Imge Publications, 2001.

⁴ C.T. Riggs, *Centennial of Constantinople Station, Near East Mission of the American Board*, İstanbul, 1931.

⁵ S.B.L. Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, New York, Princeton University Press, 1941.

⁶ For a map of the Syrian Mission, see *Appendix 1* and for more detailed information on the Syrian Mission, see K. Salibi, Y.K. Khoury, *The Missionary Herald Reports from Ottoman Syria 1819-1870*, vol. 1, Beirut, Mediterranean Press, 1995.

⁷ Id., *The Missionary Herald Reports From Ottoman Syria 1819-1870*, vol. 5, cit., 1995.

organized the infrastructure in the Syria Mission and increased the number of missionaries in the region. When conversion activities accelerated in the stations and outposts, the decision was made to open an influential school.

Therefore, it was resolved in the 1862 meeting of the American Board of Commissioners for Foreign Missions (ABCFM) that Syrian Protestant College would be opened. The decision was driven by Daniel Bliss⁸ and William E. Dodge⁹. As reported by Bliss, Syrian Protestant College opened its doors on December 3, 1866 with 16 students and four teachers¹⁰. The missionary school, which was working in collaboration with the American Board, was first established as Syrian Protestant College and later transformed into the American University of Beirut. It was an important representative of the American educational system in Beirut Station¹¹. The activities of the College resembled those of Robert College in Istanbul. The education offered in these two schools was accompanied with religious content and shaped by the American Board¹². The present study examines the activities of the school in two parts: From its establishment to 1876 and between 1876-1886.

1. *Syrian Protestant College between 1866-1876*

Syrian Protestant College first started offering education in a rental home owned by Butrus Bustani and paid for by the American Board. In the next two years, it grew into a large and well-respected campus with a hospital and medical school with the contributions of world Protestants¹³.

⁸ Daniel Bliss was the founder of Syrian Protestant College. He spent 1864-1902 in Syria Mission and ran the college from its establishment to 1902. See *Appendix 2* Daniel Bliss' photo; Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit., 1941.

⁹ Bayard Dodge, *The American University of Beirut*, Beirut, Khayats Publication, 1958.

¹⁰ Papers of The American Board of Commissioners For Foreign Mission [henceforth: P.A.B.C.F.M]. Reel 551, Doc. No: 1094, 1111, 1127, 1143, (In the coming endnotes, the documents of the American Board Archives will be abbreviated as P.A.B.C.F.M. The reel information shows the number of microfilm while document number denotes the number of the document in the microfilm), Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit., *American University of Beirut, Fact Book, 2013-2014*; J.L. Garbill, *Protestant Diplomacy and The Near East Missionary Influence on American Policy 1810-1927*, Minneapolis, University of Minnosota Press, 1971.

¹¹ F.A. Ross, C. Luther Fry, A. Sibley, *The Near East and American Philanthropy*, New York, Columbia University Press, 1929.

¹² J.A. Field, *America and the Mediterranean World 1776-1882*, New Jersey, Princeton University Press, 1969.

¹³ Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit.

The 1866 Foundation Council of the Board was a factor in Syrian Protestant College becoming effective in the region. President William A. Booth (New York), Director of Financial Affairs William E. Dodge (New York), Dawid Hoadley (New York), S.B. Chittenden (New York), Abner Kingman (Boston), and Joseph S. Ropes (Boston) served on the Foundation Council and ensured that the school was built on solid foundations¹⁴.

The missionaries mentioned above also served in the college and preached the principles of Christianity. William A. Booth served as President between 1863-1895, William E. Dodge worked in financial affairs between 1863-1883, Dawid Hoadley worked in the mission between 1863-1873, S.B. Chittenden between 1863-1883, Abner Kingman between 1863-1878, and Joseph S. Ropes between 1863-1873¹⁵.

All missionaries serving on the Board of Commissioners supported Syrian Protestant College in 1866. During the early years, missionaries worked on developing the teaching staff, solving building problems and alleviating language problems. In 1867, they were making time to get to know their environment and students, the majority of whom were Arabs. A noteworthy fact was that 15 of these Arab students were relatives¹⁶.

The effort of American missionaries to fuel Arab nationalism in the College should not be overlooked. First, they attempted to understand the structure of the Arabic community and then made an effort for Arabic language to flourish. In 1867, American missionaries were prioritizing Arabic Grammar and Algebra courses in the region with the help of local educated Arabs¹⁷.

During the foundation stage of Syrian Protestant College, American missionaries faced problems developing the teaching staff. In 1867, the teacher named Ali Nuser-ed-Deen (Nasireddin) left the college as he did not wish to teach mathematics courses, and the teacher named Gregory el Khoury retired without explanation¹⁸. Problems such as these created difficulty in curriculum implementation.

Most American schools in the Ottoman Empire, including Syrian Protestant College, received world Protestants' donations and the Board's support. The missionaries gave the central station a detailed account of these contributions. In 1867, they expressed their gratitude to philanthropists in the region for contributing 9 gold coins and to the Protestants for donating 66 Lira to Syrian Protestant College¹⁹.

¹⁴ P.A.B.C.F.M. Reel 551, Doc. No: 1085.

¹⁵ Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit. For staff of Syrian Protestant College see Appendix 3.

¹⁶ P.A.B.C.F.M. Reel 551, Doc. No: 1093.

¹⁷ *Ibid.*

¹⁸ *Ibid.*

¹⁹ *Ibid.*

In 1868, the missionaries were struggling to adapt to their conditions and trying to avoid interruptions in education. Ten students had dropped out for various reasons but the missionaries resolved to continue teaching English, Euclidian Geometry, Philosophy, French, and Arabic for the remaining students on 24 June 1868. Throughout this year, Mr Charlier, Mr John Fraser and Mr Assaad Shadoody worked at the College as teachers²⁰.

Similar to other American schools in Anatolia, Syrian Protestant College also was a paid boarding school. In 1869, there were 35 boarding students paying 12 Turkish Liras in annual fees. These fees were mentioned in detail in annual reports and sent to the headquarters in Boston²¹.

In 1869, the departments of the college started to crystallize and the students became divided into 5 classes: 3 Literature and 2 Health Department classes. While Dr. Post, Sheik Yusuf, and Sheik Nasif were offering Arabic courses, Turkish was also included in the program²². In addition, Daniel Bliss grew the library with the help of Protestants. Serious support was received from Cyprus, Greece and America²³. Books were acquired for the use of professors, teachers and students²⁴. The Protestant college not only offered medical and literature education, but also promoted Protestantism as a mission school. As reported by Daniel Bliss, weekly Bible courses continued and Sunday school was attended by a few College students²⁵.

During 1870, the Medicine and Literature departments in Syrian Protestant College continued their development. Twenty-nine students were admitted to the Medicine department and 48 to the Literature department. An important development in the same year was the recognition of the medical diplomas granted by the College by the government, as a result of the meeting between Missionary Dr Van-Dyck and the Syrian governor. Thus, the graduates of Syrian Protestant College became able to work as health workers in Ottoman Empire. American Chief Consul J. Aug. Johnson was influential in Syrian Protestant College earning this privilege. Growing student numbers and diplomas becoming valid in the empire convinced American missionaries that a new building was needed for the faculty. Therefore, the Board of Commissioners started to collect donations from English and American Protestants²⁶.

Donations were not limited to money. Missionaries and professors also gave seminars at the college to support it in 1870, and donated rare history and Arabic books to the library²⁷.

²⁰ P.A.B.C.F.M. Reel 551, Doc. No: 1094, 1095.

²¹ P.A.B.C.F.M. Reel 551, Doc. No: 1095.

²² *Ibid.*

²³ P.A.B.C.F.M. Reel 551, Doc. No: 1096.

²⁴ P.A.B.C.F.M. Reel 551, Doc. No: 1097.

²⁵ P.A.B.C.F.M. Reel 551, Doc. No: 1098.

²⁶ P.A.B.C.F.M. Reel 551, Doc. No: 1098, 1099.

²⁷ P.A.B.C.F.M. Reel 551, Doc. No: 1099.

Within 1870, English, Latin, Geology, History, Economy, Land Geology, and Philosophy courses were included in the college program with the efforts of Professor Dodge²⁸. With Dr Van Dyck's support, a health clinic and chemist's started to serve the students in the same year. Donations were collected to build a hospital building²⁹.

According to Missionary Bliss, the college completed its 4th year with success in 1870. What missionaries valued the most was the recognition of the school diploma by the Ottoman State³⁰. President Bliss emphasized that the school did not discriminate between blacks and whites, or between different religious groups such as Muslims, Christians, Jews³¹.

In 1870, Syrian Protestant College served students from all religions, thus reflecting the colorful and tolerant climate of the Ottomans. At the same time, the recognition of the school's diploma by the Ottoman government was considered a great success by the missionaries. One of the reasons why the diploma was accepted was the quality of the medical education offered and the need for doctors throughout the empire.

The recognition of the diploma also increased the region's interest in the school. In 1871, 21 new students enrolled in the college³². Another noteworthy fact about the school, which had been established with the purpose of Protestantism, was its strict student discipline. Missionary teachers explained the purpose of discipline as giving proper moral education and raising students' self-respect³³.

In 1871, the French department was being run by Mr Wernes, Arabic by Ibrahim Hourani, English and Latin by Mr Edward Van-Dyck, and literature by Professor Dodge³⁴. The Syrian Protestant College Medical School Administrative Board included Mr Madem, Dr Thomson, Mr Robertson, Sophia Grarff and Dr Van Dyck³⁵. In this era, the teaching staff of the school grew and new buildings were needed. The campus started to take shape and the college meeting hall was built³⁶.

In 1871, there were increased efforts to offer modern medical education at the College. Dr Van Dyck was an expert in chemistry, Dr Wortabet in anatomy, and Dr Post in botanics, and they were engaged in medical studies

²⁸ P.A.B.C.F.M. Reel 551, Doc. No: 1100.

²⁹ *Ibid.*

³⁰ P.A.B.C.F.M. Reel 551, Doc. No: 1101.

³¹ Stephen B.L. Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit.

³² P.A.B.C.F.M. Reel 551, Doc. No: 1101.

³³ P.A.B.C.F.M. Reel 551, Doc. No: 1102.

³⁴ *Ibid.*

³⁵ P.A.B.C.F.M. Reel 551, Doc. No: 1103.

³⁶ See *Appendix 4*: Photo of Syrian Protestant College premises; P.A.B.C.F.M. Reel 551, Doc. No: 1087.

and publications³⁷. They were at the same time working as missionaries at the American Board. The American missionaries working at the Syrian Protestant College during these years were Dr Cornelius Van Dyke, Father Daniel Bliss, Dr John Wortabet, David Stuart Dodge, Dr George E. Post, Dr Edwin R. Lewis, and Dr Harvey Porter³⁸.

The first group of students graduated from the medicine department of the college in 1872. The missionaries referred to the graduation of these 6 students as a satisfying outcome. Hosting many Muslim, Jewish and Durzi students, the college also carried out missionary activities involving these medical students. The students were taken to the Protestant church and given Bible courses. Also, Dr. Lewis met with the students weekly for prayers³⁹. In these ways, Syrian Protestant College showed that it was acting in line with its original aims.

The year 1873 was important for Syrian Protestant College because the long-expected and valued medical school building was completed. This was, according to the missionaries, one of the most significant steps in the establishment stage of the College⁴⁰. With the support of the Board, the buildings were built in a modern way. It was written in the 1873 report that the estate of the entire school was registered in the name of American missionaries, to the delight of Missionary Bliss⁴¹. This meant that the American Board of Commissioners acquired the campus land from the Ottomans. This acquisition paved the way for the American missionaries to permanently settle in the region. Indeed, this college is still run by Americans in our day as the American University of Beirut. Similarly, the acquisition of the Robert College premises also gave American missionaries the right to stay permanently in the capital of the Ottoman state. This college is also in operation nowadays.

American missionaries tried to keep close contact with authorities to be able to sustain their institutions. In 1873, Syrian governor Suphi Pasha gave Syrian Protestant College a gift of their choice of silver coins from his collection⁴². The acquisition of the college and other privileges only happened thanks to these close relations that the missionaries kept.

In 1873, missionaries scrutinized the education system of their school and resolved in the faculty board meeting that oral exams would accompany written exams so students would be better able to express themselves⁴³. Raising the quality of education was always among the college's and teachers' priorities. They designed new course materials for students; Professor Porter published

³⁷ P.A.B.C.F.M. Reel 551, Doc. No: 1103.

³⁸ See *Appendix 5*: Photos of Syrian Protestant College staff between 1870-1874, P.A.B.C.F.M. Reel 551, Doc. No: 1088.

³⁹ P.A.B.C.F.M. Reel 551, Doc. No: 1104, 1105, 1109.

⁴⁰ See *Appendices 6 and 7*: Syrian Protestant College medicine building photos; P.A.B.C.F.M. Reel 551, Doc. No: 1091, 1092.

⁴¹ P.A.B.C.F.M. Reel 551, Doc No: 1107.

⁴² P.A.B.C.F.M. Reel 551, Doc No: 1109.

⁴³ P.A.B.C.F.M. Reel 551, Doc No: 1108.

his Arabic History work; and Professor Dodge prepared English materials for older students⁴⁴.

By 1873, the Faculty of Medicine had become a critical institution in meeting the health needs of the region. The St John Knight Hospital in Beirut received surgical and medical help from Syrian Protestant College Faculty of Medicine, allowing patients to make use of the hospital's clinical services. Syrian Protestant College graduate Dr Yusef Hajjar started to work in the clinic as a surgery assistant⁴⁵. The college was now employing its own graduates. The student numbers kept rising from 1866 to 1876. According to the annual report, student numbers during the first decade after the establishment of the college were as follows⁴⁶:

Table 1: Number of Students at the Syrian Protestant College during 1866-1876

By 1877, the establishment period of Syrian Protestant College was over and it had become a renowned school in the region. As shown in Table 1, the number of students increased from one year to the next, the first group of students graduated, and young doctors were raised. The missionaries at the school did not forgo their Protestantization activities. They continued to take students to Bible class and Sunday school and tried to recruit more students by extending the boarding facilities. The simultaneous existence of Medicine and Literature departments ensured that American Protestant missionaries stayed influential in Syria. Keeping good relations with the Ottomans, the missionaries lay solid foundations for the college within the first 10 years examined.

| School Term | Medicine | College | Preparation | Total |
|-------------|----------|---------|-------------|-------|
| 1866-1867 | - | 16 | - | 16 |
| 1867-1868 | 14 | 27 | - | 41 |
| 1868-1869 | 21 | 31 | - | 52 |
| 1869-1870 | 29 | 48 | - | 77 |
| 1870-1871 | 31 | 54 | - | 85 |
| 1871-1872 | 25 | 36 | 5 | 66 |
| 1872-1873 | 26 | 39 | 19 | 84 |
| 1873-1874 | 29 | 29 | 16 | 74 |
| 1874-1875 | 24 | 31 | 13 | 68 |
| 1875-1876 | 27 | 28 | 22 | 77 |

⁴⁴ P.A.B.C.F.M. Reel 551, Doc. No: 1108.

⁴⁵ P.A.B.C.F.M. Reel 551, Doc. No: 1109.

⁴⁶ P.A.B.C.F.M. Reel 551, Doc. No: 1143.

3. *Syrian Protestant College between 1877-1886*

By 1877, Syrian Protestant College had completed its 11th year and a modern campus had started to take shape. It included a chapel, 44 rooms, a medicine building, a refectory, and 28 rooms. Once the departments were functional, the process of institutionalization started and new needs arose. For instance, the Philosophy department needed furniture and a new electricity machine⁴⁷. Similarly, two models and a skeleton showing different parts of the body were purchased for the Anatomy Department, and the college library was formed⁴⁸. Theology books, English reference books, history and literature books, Arabic books, the New Testament, and ancient works were added to the shelves⁴⁹.

At the same time, various collections were acquired to be able to gather information on the region. In 1877, Geology Department put together a collection of minerals, molluscs and fossils, and collected 3,000 specimens of 1,500 species for their mollusc collection⁵⁰. The flora of Syria and Palestine was very rich and several thousand species of herbs were gathered⁵¹. Different departments of the Protestant College strived together to reveal the complete properties of the region. However, it is doubtful whether the locals knew about this.

In its second decade, the College aimed to have a presence with its graduates. In 1877, a total of 87 students graduated from the school. Of these, 39 were medical students, 49 were literature students, and 3 were pharmacy students. These students started to work in different parts of the country as doctors, preachers, teachers, and pharmacists⁵².

In 1877, Dr Van Dyck (Principal, Professor of Theology) was teaching medicine and astronomy courses; Father E. Post was teaching surgery courses; Father Edwin R. Lewis was professor of chemistry, geology and physics; Hary Porter was professor of logic and history; Isaacett Hall was professor of English; Joshua E. Crane was Director of Preparatory School; and R.W. Brigstooke was teaching women's and children's diseases courses. There were 4 local teachers in the college, two of whom were teaching French, one Arabic, and one Turkish⁵³.

The observatory at the College conducted modern astronomy studies. The astronomy department taught Practical Astronomy in higher grade levels, let them observe the Sun, and taught them about Mercury. In addition to observing the stars, temperature records were kept and precipitation levels were announced⁵⁴.

⁴⁷ P.A.B.C.F.M. Reel 551, Doc. No: 1110.

⁴⁸ P.A.B.C.F.M. Reel 551, Doc. No: 1111.

⁴⁹ *Ibid.*

⁵⁰ P.A.B.C.F.M. Reel 551, Doc. No: 1110.

⁵¹ P.A.B.C.F.M. Reel 551, Doc. No: 1111.

⁵² P.A.B.C.F.M. Reel 551, Doc. No: 1112.

⁵³ P.A.B.C.F.M. Reel 551, Doc. No: 1110.

⁵⁴ P.A.B.C.F.M. Reel 551, Doc. No: 1112. For temperature and precipitation data from 1874 to 1877, see *Appendix 8*, P.A.B.C.F.M. Reel 551, Doc. No: 1114.

The presence of an astronomy department at the College, the observation of the Sun and Mercury, and collection of climatic information show that Syrian Protestant College was a contemporary and modern institution. At the same time, they conducted noteworthy studies with their students to get to know the region. Research into temperature and precipitation levels in 1874 revealed the interest of missionaries in the region and the steps they were taking for the future.

The main purpose of the Protestant missionary school was to foster Arabic nationalism. For this reason, they needed Christian Arabs. The courses at school were offered both in Arabic and English. Revitalization of Arabic was taken seriously and the school became instrumental in the development of Arabic nationalism. Decisions were made about next year's curricula in the faculty meeting in 1878, and the need for Arabic language and literature to be included in the program in 1878-1879 was emphasized. The missionaries stressed the importance of Arabic as they believed Christianity could best be spread and the East could best become civilized in their own language. They reported that an important purpose of the school was to prepare Syrian, Egyptian and Cypriot youth for a global life⁵⁵.

In 1878, the collection efforts of American missionaries began once again. Dr. Post continued his work on herbs and collected a total of 4,335 species: 1,600 from South and North America, 600 from Italy, 600 from Hungary, 160 from Austria, 75 from Istanbul and environs, 200 from Canada, 100 from Illinois, and 1,000 from Southern Europe⁵⁶. In 1878, Professor Porter, Yusuf Kahil and Fezes Mallat contributed to the institute by collecting 1,500 different plant species from Damascus. With new species, the number exceeded 5,000⁵⁷. The American Board of Commissioners allocated a significant fund for scientific studies in 1878⁵⁸.

School information for 1879 exists in Missionary Bliss' reports. According to the reports, 80 out of 121 students at the college in 1879 were boarding students. Three students graduated from the medical school, 2 from pharmacy school and 5 from the literature department. In 1877-1878, student fees were 99.000 piaster while in 1878-1879 the sum was 132.000 piaster⁵⁹. Materials were purchased for anatomy, medicine, surgery, and zoology cabinets for student use⁶⁰.

⁵⁵ P.A.B.C.F.M. Reel 551, Doc. No: 1115.

⁵⁶ *Ibid.*

⁵⁷ P.A.B.C.F.M. Reel 551, Doc. No: 1116.

⁵⁸ In 1877 and 1878, the budget of Syrian Protestant College was as follows: 1877: (In piaster) July 1: Cash in Ottoman Bank: 26.972,0; June 30: Housing and employee expenses: 86.406,10; June 30: Salaries: 295.256,0; 1878: March 21: Transfer from New York: 860.64,0; April 30: From A. Booth: 1.983; May 13: From Mrs Stillman: 655; May 1: From Dr Lewis and Porter: 2.360,10; May 1: Book returns: 394.68; June 30 from boarding students: 101.958; June 30: Transfer from New York: 111.35; June 30: Cash received for diplomas and books: 9871,30. P.A.B.C.F.M. Reel 551, Doc. No: 1116.

⁵⁹ P.A.B.C.F.M. Reel 551, Doc. No: 1117.

⁶⁰ *Ibid.*

Satisfying work was undertaken in collaboration with St. John's Hospital. Hospital furniture was bought for 4-5 thousand dollars and the building was extended and maintained. A total of 12,000 outpatients and 580 patients were treated in the hospital⁶¹. In this way, it became a critical health institution in the region. This showed that the American Board had clearly established the needs of the region and understood that their long-term existence there depended on education and health missions. In 1879 as well, the American Board allocated a significant sum for Syrian Protestant College. Missionaries carefully recorded this budget data in their annual reports⁶².

In 1880, College buildings were extended as the number of students increased and new needs emerged. The income from boarding students and others was 136.000 piaster⁶³. It was also in this year that an English catalogue became prepared for the first time at Syrian Protestant College⁶⁴. Thereafter, school yearbook and catalogue preparation turned into a tradition at American missionary schools. The same trend could be observed in other American schools throughout Anatolia⁶⁵.

In 1881, the 15th annual report of Syrian Protestant College was written. One of the most noteworthy developments at the school was the completion of a building for preparatory school students. American style desks and chairs were imported for the large and airy 100-student classroom of the preparatory school. The classroom started to be used in the fall semester of 1881⁶⁶.

In 1882, 6 professors, 2 instructors, and 7 teachers were working at the College⁶⁷. During this year, the church and school foundation paid for the expenses of some students. In the same year, funds were used to renovate the building as well as the kitchen and living room for boarding students. Lighting and heating bills were also paid. From the treasury in New York, a sum of 2,290 Pounds was received. Of this amount, 2,090 was spent on staff salaries⁶⁸. In its second decade, Syrian Protestant College grew its number of students, teachers and buildings. World Protestants continued to contribute to the development of the school through donations. For instance, funding for books was sent by the Theodore Foundation⁶⁹.

⁶¹ P.A.B.C.F.M. Reel 551, Doc. No: 1118.

⁶² See *Appendix 9* Syrian Protestant College budget for 1879, P.A.B.C.F.M. Reel 551, Doc. No: 1118.

⁶³ P.A.B.C.F.M. Reel 551, Doc. No: 1119.

⁶⁴ P.A.B.C.F.M. Reel 551, Doc. No: 1120.

⁶⁵ For detailed information on American schools in Anatolia, please see Ö. Yıldız, *American Schools in Anatolia*, İstanbul, IQ Publications, 2011.

⁶⁶ P.A.B.C.F.M. Reel 551, Doc. No: 1121.

⁶⁷ Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, cit.

⁶⁸ P.A.B.C.F.M. Reel 551, Doc. No: 1123.

⁶⁹ P.A.B.C.F.M. Reel 551, Doc. No: 1124.

Syrian Protestant College offered modern education. Its educational practices were known throughout the region and the world. To earn this popularity, Dr. Van Dyck held meteorological observations in the school observatory in 1882 and disseminated the results by telegram to Washington, London, Paris, Vienna, Istanbul and Manila. A weather station was built in the college but the accidental breakage of the mercury barometer during a measurement cost the missionaries⁷⁰.

The activities of the college continued in 1882. Four hundred different plant species were collected and studied. Chemistry and physics departments continued their studies and were allocated 25 Turkish Lira. The library was given 60 volumes of new books and 3 volumes of Britannica Encyclopedia. Other books arrived from London and the students used the library regularly⁷¹. The health department library was also given 500 Lira worth of books. The zoology collection grew, and the skeleton of a whale and an African elephant, as well as a tusk were added⁷². Preparatory classes also continued successfully⁷³.

As can be seen, Syrian Protestant College continued to develop steadily on solid foundations. The employment of its graduates in prestigious positions made the school one of the most renowned schools in Syria. The graduates did not have employment problems and worked as doctors, pharmacists, translators, teachers, preachers, printers, civil servants, and writers. By meeting the doctor needs of Syria, the college received state support as well⁷⁴.

One of the most important characteristics of Syrian Protestant College was the importance they attached to practice. The presence of practicum facilities and teachers' devotion to this enabled them to train more qualified doctors. As mentioned by histology teacher Dr Wortabet in his report dated 15 December 1882⁷⁵:

All medical schools hire anatomy professors to work as practicum teachers. Generally, these are new graduates and give students practical information. Practical anatomy studies have been taught in this way in our medical school for 25 years. Practical training is more effective. Medical students receive Anatomy, Psychology and Histology courses. Use of microscopes is a must in specialized work. Such practices increase professional, informative and education standards for our students.

This shows the value Syrian Protestant College attached to practical education. The educational practices at Syrian Protestant College involved

⁷⁰ *Ibid.*

⁷¹ *Ibid.*

⁷² *Ibid.*

⁷³ P.A.B.C.F.M. Reel 551, Doc. No: 1125.

⁷⁴ For detailed information on the names and professions of Syrian Protestant College graduates, please see: Ş. Mutlu, *American Missionary Schools in Beirut and Syrian Protestant College*, «Tarih Journal», vol. 46, 2009, pp. 107-128.

⁷⁵ P.A.B.C.F.M. Reel 551, Doc. No: 1127.

a special emphasis on language education in the preparatory year. Students studied 14 hours of English and 4 hours of Arabic weekly. Other than these courses, preparatory students also took 2 hours of mathematics and 3 hours of Bible studies. In the Literature Department, students took 28 hours of classes per week in the preparatory year (5 hours of English, 5 hours of Arabic, 4 hours of French, 5 hours of mathematics, 4 hours of physiology, 4 hours of natural geography and 1 hours of Bible studies weekly). Following this year, literature students continued their studies for another 3 years. In the first year, History and Philosophy were added to the curriculum; in the second year, Logic, Chemistry and Economy; and in the final year, Astronomy and Plants.

In the Medicine Department, which was the most valued department by Syrian Protestant College missionaries, studies lasted for four years. In the 1st year, students took 28 hours of classes weekly. First year courses included Chemistry, Histology, and Biological Sciences, while second year courses included Autopsy, Medical Materials, Physiology, and Hygiene. In the third year, students took 41 hours of weekly classes: 12 hours of Pathology, 13 hours of Surgery, 3 hours of Obstetrics, 7 hours of Women's Diseases, 3 hours of Dermatology, 3 hours of Hygiene. During the fourth year, Eye and Ear Diseases, and Bacteriology were added to the curriculum.

In the Chemistry Department, Chemistry and Chemical Examination courses had a prominent role. The educational practices at the College emphasized language courses and had a modern edge considering the period when they were offered. Libraries and laboratories were available, the teaching staff consisted of field specialists, and doctors, teachers, chemists and civil servants were educated for the Ottoman Empire⁷⁶.

In 1883, the 17th annual report of Syrian Protestant College was prepared. Within this year, 99 students paid college fees as full boarding students, 33 paid 50% reduced fees and 43 were sponsored by Protestants. Instructional activities were enriched and the library was particularly supported⁷⁷.

The school never moved away from its original purpose of Protestantization. The 1883 declaration by Syrian Protestant College teachers that they would act totally in line with Protestant beliefs is an obvious sign that the school was a missionary institution⁷⁸.

In the declaration, the staff stated that the school was established with missionary purposes and stayed loyal to the principles of Protestantism. The staff made an effort to spread Protestantism among students. In 1884, Father W.W. Martin was contracted to serve two hours daily at Syrian Protestant College. The continuity of religious activities was very important for missionaries⁷⁹.

⁷⁶ Mutlu, *American Missionary Schools in Beirut and Syrian Protestant College*, cit., pp. 107-128.

⁷⁷ P.A.B.C.F.M. Reel 551, Doc. No: 1131.

⁷⁸ P.A.B.C.F.M. Reel 551, Doc. No: 1133.

⁷⁹ P.A.B.C.F.M. Reel 551, Doc. No: 1134.

Therefore, even though school fees were collected, donations were also received so that students could attend missionary school. As understood from the numbers mentioned in the 1884 report⁸⁰:

- In 1880-1881, 122 students were paying fees, 23 students were sponsored.
- In 1881-1882, 160 students were paying fees, 34 students were sponsored.
- In 1882-1883, 170 students were paying fees, 33 students were sponsored.
- In 1883-1884, 180 students were paying fees, 33 students were sponsored.

In this way, missionaries could instil their own religious beliefs in students. In 1885, the 19th annual report of Syrian Protestant College was prepared by Missionary D. Bliss. As reported by Dr Bliss from Beirut on 25 June 1885, Mr Packard completed his mission and returned to America. Dr. Neal retired and went to Antep. Mr West was transferred to the Mathematics Department, and Mr Martin replaced Mr Packard in the English Department. Mr Giroux was employed as assistant in the Preparatory School. Father A. Macfarlane continued his duty. A local Syrian, Mr Paul Stefano, was also working for Syrian Protestant College. The medical school had Dr Chas. T. Dight, Dr John C. Fisher, Mr Dakheel and Sheik Khaleel⁸¹. Syrian Protestant College had a robust teaching staff. Student numbers at the school in the second decade were as follows⁸²:

Table 2: Syrian Protestant College student numbers between 1876-1886

Table 2 shows that the number of students in Syrian Protestant College of Beirut increased steadily over the years. The increasing student number may be attributed to the fact that the school was embraced, came to be an important institution in the region and had their graduates employed in prestigious jobs. In the second decade studied until 1886, Syrian Protestant College largely completed its development and become an important school in the region with the modern education it offered.

⁸⁰ P.A.B.C.F.M. Reel 551, Doc. No: 1135, 1136.

⁸¹ P.A.B.C.F.M. Reel 551, Doc. No: 1137, 1138.

⁸² P.A.B.C.F.M. Reel 551, Doc. No: 1143.

| School Year | Medicine | College | Preparation | Total |
|-------------|----------|---------|-------------|-------|
| 1876-1877 | 25 | 34 | 47 | 106 |
| 1877-1878 | 24 | 33 | 51 | 108 |
| 1878-1879 | 29 | 25 | 67 | 121 |
| 1879-1880 | 37 | 33 | 38 | 108 |
| 1880-1881 | 41 | 29 | 51 | 121 |
| 1881-1882 | 47 | 31 | 74 | 152 |
| 1882-1883 | 47 | 37 | 86 | 170 |
| 1883-1884 | 36 | 43 | 99 | 178 |
| 1884-1885 | 34 | 56 | 96 | 186 |
| 1885-1886 | 31 | 61 | 76 | 168 |

In the period between 1866-1886, missionary activities in the Syria Mission grew and Arab nationalism started to flourish. In order to curb missionary activities, the Ottomans were forced to separate Beirut from Syria in 1887 and make it into a new province⁸³. However, Beirut becoming a province did not significantly affect the activities of American missionaries and they continued to work systematically. Syrian Protestant College continued to function under the same name until becoming American University of Beirut in the 1920s.

Conclusion

In conclusion, a study of Syrian Protestant College in its first two decades between 1866-1886 showed that the school was protected by American missionaries. Indeed, the college has continued from 1866 through our day, and remains one of the most important outcomes of the Syria Mission acting on behalf of the American Board of Commissioners.

The resolution to establish Syrian Protestant College was made in the mission meeting of the American Board of Commissioners (ABCFM) in 1862, and its founder and President, Missionary Daniel Bliss, continued to act as manager until 1902. With Daniel Bliss' leadership, the college grew by the day and managed to become a renowned school in the region.

The college and its managers were generally missionaries and priests affiliated with the American Board. The purpose of the school was missionary activities, as is evident from its staff and deeds. American missionaries made an effort to spread Protestantism and Christianity among their students. They took them to Protestant church, gave them Bible courses, and organized weekly prayer meetings for them. As stated in the study, the 1884 declaration

⁸³ R. Işık, *The Activities of Protestant Missionaries in Syria and Lebanon Concerning Women between 1820-1950*, «Firat University Religious Studies Faculty Journal», vol. 15, n. 2, 2010, p. 185.

of Syrian Protestant College teachers and staff clearly showed that the school had been founded on missionary purposes and followed Protestant principles.

Another conclusion of the study focuses on the efforts of American missionaries to support Arab nationalism. In order to achieve this, they first familiarized themselves with the Arabic social structure and then promoted the Arabic language. American missionaries placed special importance on Arabic Grammar and Algebra courses and designed course materials. Professor Porter studied Arabic history, wrote it down, and strived to have Christian Arabs in the region. The clear emphasis on fostering Arabic language and literature in the objectives of the 1878-1879 curriculum shows that Syrian Protestant College aimed to create Arab nationalism in the long run.

The study also revealed that Syrian Protestant College had many things in common with other American schools in Anatolia. Similar to them, Syrian Protestant College served both boarding and daytime students, and collected school fees. Other similarities included strict discipline, modern instruction, and practical training. At the same time, similar to other American schools in Ottoman territory, Syrian Protestant College was also supported by the donations of world Protestants and the American Board. Furthermore, the international aspects of American schools were also evident in Syrian Protestant College, such as educating students of many beliefs and origins, regardless whether they were black or white, Muslim, Christian, or Jewish.

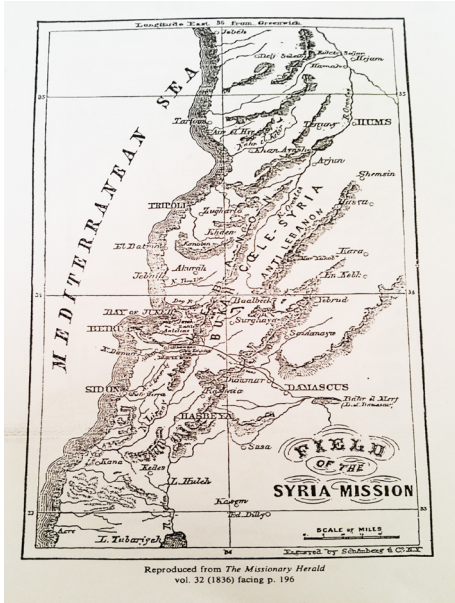
Syrian Protestant College succeeded in providing students with outstanding education. American schools in general offered modern education and strived for a scientific presence. Similar efforts in Syrian Protestant College included the opening of a geology department, a collection of minerals, molluscs and fossils, modern astronomy studies by the observatory in the college, the observation of the Sun and stars, transfer of important information about planet Mercury, temperature measurements and their dissemination with major world capitals.

One of the most important characteristics of Syrian Protestant College was the existence of a medical school and training of doctors. As there was a major need for doctors in the Ottoman Empire, the school was granted special privileges by the state. For example, the college diploma became valid throughout the country and the campus land was allowed to become their estate. The latter enabled American missionaries to settle permanently in the region.

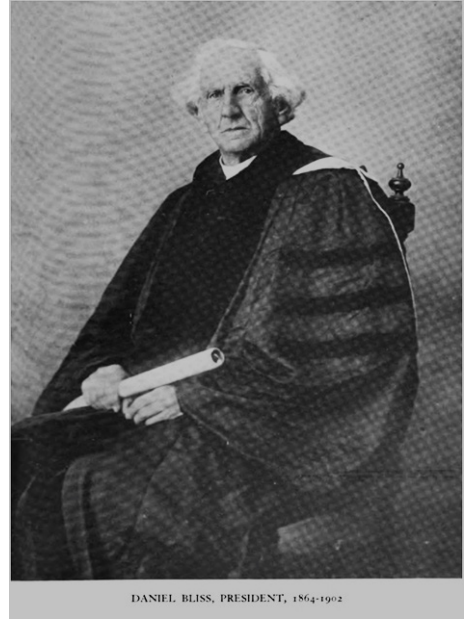
The American missionaries stayed on good terms with state officials to be able to sustain their institutions. The proximity of relations is displayed by the fact that Syrian governor Suphi Pasha gave Syrian Protestant College a selection of his silver coin collection as a gift in 1873. These warm relations facilitated the privileges mentioned above.

In sum, it may be stated that between 1866-1886, Syrian Protestant College acted in line with the purposes of missionaries, remained loyal to the principles and aims of Protestantism, provided students with modern education by the standards of its age, and fostered Arab nationalism which would stay one of its long-term purposes.

Appendices



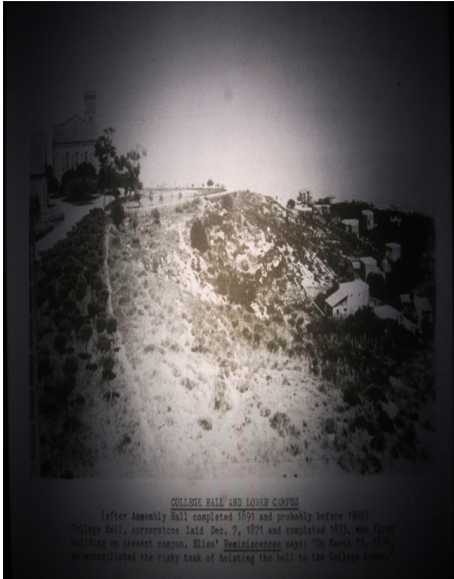
Appendix 1. Map of the Syrian Mission (Kamal Salibi, Yusuf K. Khoury, *The Missionary Herald Reports From Ottoman Syria 1819-1870*, vol. 1, Mediterranean Press, Beirut 1995, p. VI.)



Appendix 2. Daniel Bliss (Stephen B.L. Penrose, *That They May Have Life The Story of the American University of Beirut 1866-1941*, Princeton University Press, New York 1941, pp. 78-80.

*Appendix 3. Staff of the Syrian Protestant College between 1866-1886 (Stephen B.L. Penrose, *That They May Have Life The Story of The American University of Beirut 1866-1941*, Princeton University Press, New York 1941, pp. 314-328).*

| Name | Graduated from | Time spent working in Syria |
|-------------------------|-----------------------------|-----------------------------|
| Robert H. Beattie | Princeton | 1885-1889 |
| Daniel Bliss | Amherst | 1864-1916 |
| Frederick J. Bliss | Amherst | 1880-1883 |
| Richard W. Brigstocke | England | 1872-1882 |
| William Calhoun | - | 1874-1875 |
| Joshua B. Crane | Brown | 1876-1879 |
| Charles F. Dight | Mishigan | 1883-1889 |
| D. Stuart Dodge | Yale | 1864-1873 |
| John C. Fisher | Princeton L.I Medical | 1884-1889 |
| John Frase | Scotland | 1869-1871 |
| Lois F. Giroux | Hamilton | 1884-1887 |
| Samuel P. Glover | Pennsylvania | 1885-1887 |
| Isaac Hall | - | 1875-1876 |
| Franklin E. Hoskins | Princeton | 1883-1886 |
| H. W. Hulbert | Union Theology Seminary | 1885-1887 |
| Thomas W. Kay | Baltimore Medical School | 1883-1888 |
| Edwin R. Lewis | Harvard | 1870-1882 |
| Walter S. Levis | - | 1879-1880 |
| Andrew MacFarland | Pennsylvania | 1884-1885 |
| W.W. Martin | Union Theology Seminary | 1883-1885 |
| Robert J. Neal | Michigan | 1883-1884 |
| W.S. Nelson | Amherst | 1884-1885 |
| Frank E. Packard | Amherst | 1881-1884 |
| W.F. Stoutenburg | - | 1879-1881 |
| V.A. Cornelius Van Dyck | Jefferson Medical | 1867-1882 |
| Edward Van Dyck | Cairo | 1870-1871 |
| Henry Van Dyck | - | 1878-1879 |
| William T. Dyck | New York University Medical | 1880-1882 |
| Robert H. West | Princeton | 1883-1906 |
| Frank S. Woodruff | Princeton | 1885-1893 |
| Henry Wortabet | - | 1871-1872 |
| John Wortabet | New York University | 1867-1882 1883-1890 |



Appendix 4. Syrian Protestant College Building; (P.A.B.C.F.M. Reel 551, Doc. No: 1087).



Appendix 5. Syrian Protestant College staff between 1870-1874 (P.A.B.C.F.M. Reel 551, Doc. No: 1088).



Appendix 6. Syrian Protestant College medical school; (P.A.B.C.F.M. Reel 551, Doc. No: 1091).

Appendix 8. Temperature and Precipitation Data from 1874 to 1877

| Month | TEMPERATURE | PRECIPITATION (INCHES) | | | | |
|-----------|-------------|---------------------------|-----------|-----------|-----------|-----------|
| | 1874/1875 | 1875/1876 | 1876/1877 | 1874/1875 | 1875/1876 | 1876/1877 |
| July | 81,15 | 84,2 | 84 | 0 | 0 | 0,12 |
| August | 80,40 | 84,4 | 84,20 | 0 | 0 | 0 |
| September | 82 | 79,88 | 82,6 | 0 | 0,06 | 0 |
| October | 79,9 | 75,38 | 77,23 | 0,233 | 0 | 2,48 |
| November | 70,6 | 67 | 66,68 | 7,02 | 5,32 | 10,75 |
| December | 62,3 | 59,97 | 64,42 | 7,97 | 5,06 | 4,37 |
| January | 54,8 | 55,76 | 59,18 | 5,34 | 1,57 | 6,44 |
| February | 57,3 | 58,76 | 58,69 | 5,12 | 4,61 | 15,74 |
| March | 58,71 | 64,76 | 63,26 | 9 | 1,91 | 4,87 |
| April | 63,5 | 68,19 | 81,8 | 2,48 | 4,35 | 2,55 |
| May | 67,3 | 76,30 | 74,14 | 2,36 | 0,28 | 0 |
| June | 80,8 | 80,25 | 79,43 | 0,17 | 0,04 | 0 |

*Appendix 9. Syrian Protestant College Budget for 1879 (P.A.B.C.F.M. Reel 551, Doc. No: 1118)**Expenditures:*

Housing costs: 105.908
 Miscellaneous expenses: 61.643,35
 Salaries: 296.646,15
 Books from England and USA: 4.968,25
 Theodore Budget: 150.24
 Pathology and chemistry expenses: 173.67,05
 Field expenses: 101.31,20
 Construction expenses: 103.583,25
 Remaining cash: 67.038,35

Income:

Transfer from W.E. Dodge Scholarship: 53.572,20
 Cash from the Syrian Mission: 17.835,30
 Cash from Mrs Booth and Field: 3.990
 Cash from boarding students: 132.081,20
 Amount from last year: 35.903,20

Donations: 3.746
Bonds: 581,10
Diplomas: 4.920,20
Earnings from the bank: 1.044,
Book transfer amount: 1.245
Cash from the USA to Bill: 276.633,20
Dr. Lewis cash: 781,20
Book sales: 3.930,30
Returns: 22.234
Book sales cash: 10.157,05
Cash from W.E. Dodge: 107.729,25
Cash from D.S. Dodge: 4.624,30
Equipment sales: 1.360,30

Formar maestros y maestras para la patria nacional-católica. Los estudios de magisterio en la España franquista (1936-1975)

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Training teachers for a National-Catholic country. Studies for teachers in Franco's Spain (1936-1975)

ABSTRACT: The transformation generated in Spain after the military rebellion and civil war affected education and culture, and in general, all facets of society. The long duration of the scheme helps verify the cohesion of the system, although it was not linear, undergoing changes throughout its historical cycle. Following the dismantling of the republican work, in the first decades of isolation and autarky symptoms of modernity were appreciated. The takeoff of the economy, the commitment to technocracy, and education reform led to significant progress. Its evolution was reflected in the progress of education and extension of schooling in the last stage of involution regarding its inception. The educational policy began in the war period, reflecting the ideological interests of «nacionalcatolicismo» through the academic curriculum, to infiltrate the new principles and inoculate the minds. The initial training of teachers was influenced by the ideological model at the decline of the regime. For institutions teaching a wide legislation was passed, since their access to primary education (Plan 1942) to the requirement of formal education (Plan 1971), and designed training models of teachers in line with the ideological values of the regime and function roles assigned to each sex. In this research, following the methodology of educational historical character, we intend to study the curricula that shaped the magisterial authoritarian model designed by different teams of government of the dictatorship.

EET/TEE KEYWORDS: Francoism; Nacionalcatolicismo; Indoctrination; Teaching; Study plans; Gender identity; educational models; Spain; XXth Century.

Introducción

Desde los albores de la rebelión militar y a medida que avanzan las tropas militares se comienza a dismantlar las instituciones republicanas y a instaurar nuevos organismos, de acuerdo los esquemas ideológicos del orden que pretendían instaurar por la fuerza. Con la ley de 1 de octubre de 1936 se creó la Comisión de Cultura y Enseñanza dirigida por José María Pemán que asumía competencias educativas. Más tarde, por ley de 30 de enero de 1938 se creó el Ministerio de Educación Nacional. Las modificaciones afectaron a toda la estructura administrativa y a todos los aspectos de la vida española. Se fueron sucediendo una serie de «contrarreformas», entre ellas las enseñanzas del magisterio, piezas clave como instrumento de control. Dado que era fundamental formar maestros y maestras que se encargaran de afianzar los valores del nacionalcatolicismo en las nuevas generaciones¹. El nacionalcatolicismo fue la doctrina y práctica de la Iglesia católica española durante el franquismo, caracterizada por su estrecha relación con el Estado y por su control de la educación, la cultura y la vida social. El triunfo del franquismo lo fue también para el catolicismo, que presidió un «resurgir religioso de características casi fundamentalistas», sin parangón en cualquier otro país occidental europeo². Esta nueva sacralización de la vida española afectó a casi todos los asuntos públicos y a las instituciones, especialmente educativas. El franquismo «fue, en sentido laxo, el fascismo español... el único régimen fascista que se impuso tras una brutal ruptura social, una larga y sangrienta Guerra Civil, peculiaridad que no se produjo en los casos italiano, portugués o alemán»³. Lo que sucede es que «a lo largo de sus cuarenta años de existencia fue evolucionando y cambiando algunos aspectos importantes de sus formas, aunque no modificó en absoluto su primitiva esencia»⁴. Sus poderes, pues, eran «superiores» a los de Mussolini y Hitler, sin que variaran «en absoluto a lo largo de casi cuatro décadas»⁵. No obstante, es preciso puntualizar que el franquismo no fue un fenómeno totalmente asimilable en lo político a los fascismos europeos, en cambio, sus rasgos pedagógicos en buena medida eran análogos. La exaltación carismática del caudillo o dictador⁶, la alianza con los poderes fácticos (las oligarquías, los militares, la iglesia), el autoritarismo, el tradicionalismo y anti modernismo

¹ A. Escolano Benito, *La educación en la España contemporánea*, Madrid, Biblioteca Nueva, 2002, p. 160.

² A. Viñao Frago, *La educación en el franquismo (1936-1975)*, «Educar em Revista», vol. 51, 2014, p. 22.

³ B. Riquer i Permanyer, *La dictadura de Franco*, Madrid, Marcial Pons, Ediciones de Historia Crítica, 2010, p. 14.

⁴ *Ibid.*, pp. 14-16.

⁵ *Ibid.*, p. 19.

⁶ I. Saz Campos, *Franco, ¿Caudillo fascista? Sobre las sucesivas y contradictorias concepciones falangistas del caudillaje franquista*, «Historia y política: Ideas, procesos y movimientos sociales», vol. 27, 2012, pp. 32-33.

junto al patriotismo agresivo, el nacionalcatolicismo, el unipartidismo, la exclusión de todo tipo de oposición ideológica, y el irracionalismo de su retórica se proyectaron en sus programas y estilos de educación⁷. De manera que este comportamiento se reflejó en las primeras acciones del franquismo, tal como expresa Agustín Escolano, con «la utilización nacional-imperialista de la historia, la vinculación a las tradiciones e intereses de la iglesia católica, la censura de todo texto o medio de difusión opuesto al nuevo ideario, la actitud totalitaria y dictatorial, el rechazo de las ideas pedagógicas modernas y la reacción tecnocéntrica de la cultura»⁸.

En otro orden Manuel de Puelles refiere a un «primer franquismo» caracterizado por la destrucción del legado republicano, el atraso y el nacionalcatolicismo, y un «segundo franquismo» tecnocrático que culminaría la ley general de educación de 1970⁹. En sentido similar, Antonio Viñao distingue dos etapas diferenciadas: «La primera etapa (1936-1957) se caracterizó por el predominio de los aspectos totalitarios y nacional-católicos. El objetivo fue la destrucción del legado republicano para la configuración de un nuevo sistema educativo al servicio del Estado, sin renunciar por ello a la utilización de conceptos y términos pedagógicamente renovadores en un contexto y con un sentido diferente al del período precedente»¹⁰ y «La segunda etapa (1957-1975), la del desarrollismo tecnocrático, supuso la puesta al servicio del mismo de la política educativa, así como la introducción de nuevas técnicas burocrático-pedagógicas de administración y gestión del sistema educativo»¹¹.

Desde sus inicios el régimen dictatorial aplicó una política represiva similar a la de los fascismos italiano y alemán. Sus acciones se caracterizaron por la articulación de un fuerte aparato policíaco represor, que actuaba sobre determinados sectores sociales, intelectuales y grupos políticos, ejerciendo un control político e ideológico generalizado¹². Las organizaciones católicas programaron sus propias actividades formativas desde 1936. Por su parte, el Ministerio de Educación Nacional en el verano de 1937 convoca cursillos de dos semanas de duración para los maestros formados en el plan profesional de 1931. El ministro de Educación Nacional Pedro Sainz Rodríguez, con «una autonomía de gestión y un poder de decisión prácticamente absolutos» impuso la pedagogía adecuada al régimen y llevó a cabo una «contrarrevolución

⁷ A. Escolano Benito, *Discurso ideológico, modernización técnica y pedagógica crítica durante el franquismo*, «Historia de la educación. Revista interuniversitaria», vol. 8, 1989, p. 11.

⁸ *Ibid.*

⁹ M. Puelles Benítez, *El discurso educativo: del franquismo al neoliberalismo*, «Cuadernos de Pedagogía», n. 451, 2014, pp. 16-19; Vid. M. Puelles Benítez, *Modernidad, republicanism y democracia. Una historia de la educación en España (1898-2000)*, Valencia, Tirant lo Blanch, 2009.

¹⁰ Viñao Frago, *La educación en el franquismo (1936-1975)*, cit., p. 25.

¹¹ *Ibid.*, p. 27.

¹² F. Morente, *La depuración franquista del magisterio público. Un estado de la cuestión*, «Hispania», vol. LXI, n. 208, 2001, p. 667.

pedagógica»¹³. El ministro Pedro Sainz Rodríguez considera la necesidad de impregnar la formación de los maestros y maestras de los valores propugnados por el Nuevo Estado. El Curso de Orientaciones Nacionales de la Enseñanza Primaria celebrado en Pamplona del 1 al 30 de junio de 1938, persiguió el objetivo de transmitir los principios ideológicos del nuevo régimen, más que ocuparse de cuestiones didácticas. El curso clausurado con el discurso de Sainz Rodríguez titulado *La escuela y el Estado Nuevo*, donde expuso que «el Curso de Orientaciones Nacionales de la Enseñanza Primaria constituye un campo de batalla en el que las dos principales líneas ideológicas que apoyaron el alzamiento militar, fascista falangista y tradicional católica, van a enfrentarse a la hora de imponer un sistema de valores representativo del modelo social que pretendían perpetuar a través de los maestros, batalla que, en un principio, parece decantarse a favor de la Falange, pero que irá cambiando de signo gradualmente con el paso de los meses y el devenir de los acontecimientos históricos que condicionaron la política de las autoridades estatales, que en última instancia son las que tiene capacidad decisoria»¹⁴.

La educación estaba marcada, por el pensamiento de orientación fascista, rediseñado por el franquismo partiendo de las ideas que planteaba José Antonio Primo de Rivera. De modo que la educación tenía un carácter confesional, patriótico y sexista. Se llevó a cabo la politización de la enseñanza por medio de una orientación doctrinaria de todas las materias. La educación tenía que ser católica y patriótica, en contraposición con las ideas contrarias al sentimiento patrio como el internacionalismo, materialismo y cosmopolitismo¹⁵. El estrecho vínculo entre religión y política tenía su origen en la identificación del régimen franquista con la versión integrista del catolicismo. El nacionalcatolicismo fue uno de los pilares fundamentales de la legitimación del franquismo y una de sus señas de identidad. Manuel de Puelles manifiesta que «el nacionalcatolicismo se convirtió así en la pieza esencial que aglutinó a todas las fuerzas coligadas en el franquismo, y lo que es más importante, estuvo siempre presente durante la larga travesía histórica que comienza en 1936 y acaba en 1975: España fue en todos esos años un Estado plenamente confesional»¹⁶.

¹³ J.R. López Bausela, *La contrarrevolución pedagógica en el franquismo de guerra. El proyecto político de Pedro Sainz Rodríguez*, Madrid, Biblioteca Nueva / Ediciones de la Universidad de Cantabria, 2011, p. 22.

¹⁴ *Ibid.*, p. 195.

¹⁵ Vid. M. Puelles Benítez, *Evolución de la educación en España durante el franquismo*, en A. Tiana Ferrer, G. Ossenbach Sauter, F. Sanz Fernández (coords.), *Historia de la Educación (Edad Contemporánea)*, Madrid, UNED, 2002. pp. 329-349; I. Saz Campos, *Franquismo*, en J. Fernández Sebastián y J. Fuentes, *Diccionario político y social del siglo XX español*, Madrid, Alianza, 2008. pp. 559-568; P. O'Malley, *La educación en la España de Franco*, Madrid, S.L. GENS, 2010; F. Sevillano, *Franco. Caudillo de España por la gracia de Dios*, Madrid, Alianza, 2010; L. Zenobi, *La construcción del mito de Franco*, Madrid, Cátedra, 2011.

¹⁶ M. Puelles Benítez, *Religión y escuela pública en nuestra historia: antecedentes y procesos*, «Bordón. Revista de pedagogía», vol. 58, nn. 4-5, 2006, p. 526.

En los últimos años la educación franquista ha sido objeto de una especial atención por parte de los historiadores. Producto de las investigaciones realizadas han sido las diversas publicaciones y el ingente número de monografías¹⁷. En este trabajo pretendemos estudiar los planes de estudio de magisterio diseñados por los distintos equipos de gobierno de la dictadura, incidiendo en el modelo de maestros y maestras sustentado en un desarrollo curricular de carácter religioso, patriótico, sexista y discriminatorio. Esta investigación que forma parte del Proyecto I+D+i (Referencia: EDU2011-28944) sigue la metodología de carácter histórico educativo. Las principales fuentes documentales que permiten reconstruir el proceso de formación del magisterio son variadas y diversas. Realizamos una revisión de las publicaciones efectuadas en relación el tema, analizamos la legislación, manuales, programas curriculares y planes de estudio de magisterio para realizar una reflexión crítica sobre la evolución y las tendencias de cambio.

1. *Adoctrinamiento ideológico y represión de otras tendencias*

La brutal represión ejercida sobre la población junto a la propaganda y socialización garantizaron la prolongación de la dictadura, al margen de los apoyos de amplios sectores que componían la sociedad española como la iglesia, el ejército, fuerzas armadas, la falange y sectores conservadores. La «depuración» fue un proceso y un filtro a través del que se pretendía dismantelar toda la obra educativa republicana, caracterizada por el laicismo, la coeducación y la

¹⁷ Citamos, de forma sucinta, algunos trabajos: P. Abos Olivares, *Franquismo y Magisterio: Represión y depuración de Maestros en la provincia de Teruel*, Zaragoza, Prensas Universitarias De Zaragoza, 2015; N. Araque Hontangas, *La formación de las maestras durante la primera etapa del Franquismo*, «Tendencias pedagógicas», n. 14, 2009, pp. 117-128; M. Bedmar Moreno, I. Montero García, *Visión histórico-educativa en la España del franquismo. Influencias y repercusiones a través de los testimonios de vida de nuestros mayores*, «Revista de Investigación Educativa», vol. 28, n. 1, 2010, pp. 141-156; J. Casanova Ruiz (coord.), *Cuarenta años con Franco*, Barcelona, Crítica, 2015; A. Gómez Rodríguez, A. Canales Serrano, *La larga noche de la educación española. El sistema educativo español en la posguerra*, Madrid, Biblioteca Nueva, 2015; C. Lomas (coord.), *Lecciones contra el olvido. Memoria de la educación y educación de la memoria*, Barcelona, Ministerio de Educación & Octaedro, 2011; J.R. López Bausela, *La contrarrevolución pedagógica en el franquismo de guerra. El proyecto político de Pedro Sainz Rodríguez*, Madrid, Biblioteca Nueva/Ediciones de la Universidad de Cantabria, 2011; O'Malley, *La educación en la España de Franco*, cit.; J.M. Marina, J.M. González García (edd.), *Memoria y futuro. Construcción del vínculo político*, Madrid, Biblioteca Nueva, 2015; S. Marquès Sureda, *Una didáctica de la historia educativa sobre el exilio del magisterio republicano*, «Historia de la educación. Revista interuniversitaria», vol. 33, 2014, pp. 393-396; M.D. Peralta Ortiz, *Los proyectos sobre los estudios de magisterio en los comienzos del franquismo*, «Bordón. Revista de Pedagogía», vol. 1, 2000, pp. 69-86; Id., *La escuela primaria y el magisterio en los comienzos del franquismo*, Madrid, Universidad Pontificia Comillas, 2012.

introducción de nuevos métodos pedagógicos¹⁸. Producto de la aplicación de las medidas depuradoras fue la actuación sobre el magisterio que tenía implicación con la política educativa anterior. La represión desatada fue de gran magnitud y tuvo nefastas consecuencias en la educación¹⁹. La depuración no fue en exclusiva para el personal docente, se aplicó a todos los funcionarios y trabajadores de la administración pública y a la sociedad entera. Se persiguió a todas las personas relacionadas con la defensa de ideales democráticos. Aproximadamente una cuarta parte del magisterio resultó sancionado. Un amplio grupo no sufrió ningún tipo de represalia, superando el proceso depurador sin ningún efecto negativo²⁰. Este dato induce a pensar que no todo los profesionales de la enseñanza eran afines a los principios democráticos y laicos que defendía la República. Es cierto que hubo celo inquisitorial y rigor en la actuación de las comisiones provinciales y de los organismos centrales del Ministerio, y también que una parte importante del magisterio era ajeno a la política educativa o de alguna manera estaban en desacuerdo con algunos de sus planteamientos. Varios autores han confirmado la existencia de divergencias en el seno del magisterio y han constatado que los maestros y maestras formados en los planes de estudio anteriores (por ejemplo, el plan de 1914) permanecían aferrados a la pedagogía tradicional y a sus rutinas metodológicas²¹. En aquellas décadas una parte del colectivo docente era muy innovador, emplearon nuevas metodologías y renovaron los usos pedagógicos en las aulas mientras un importante sector fue más conservador. De ahí que no todo el magisterio se significara en su acción docente y fueran acérrimos defensores de principios metodológicos e ideológicos afines a la política educativa republicana²².

El magisterio desde el año 1936 hasta 1975, se caracterizó por el control ideológico y la construcción del modelo magisterial autoritario en sintonía con los valores del nuevo orden. Hasta finales del franquismo se rebajó el nivel académico y las exigencias para alcanzar la titulación de magisterio. En la

¹⁸ La depuración se instituyó por Decreto de 8 de noviembre de 1936 (Decreto n. 66, B.O.E. de 11 de noviembre de 1936, dado en Salamanca). En el preámbulo se justificaba la necesidad de una labor depuradora en el personal docente de todos los niveles educativos, haciendo una mención expresa a los maestros: «El hecho de que [...] el Magisterio en todos sus grados y cada vez con más raras excepciones haya estado influido y casi siempre monopolizado por ideologías e instituciones disolventes en abierta oposición con el genio y tradición nacional, hace preciso que... se lleve a cabo una revisión total y profunda en el personal de Instrucción Pública, trámite previo a una reorganización radical, definitiva de la Enseñanza».

¹⁹ A. Ávila Fernández, J.A. Holgado Barroso, *Formación del Magisterio en España. La legislación normalista como instrumento de poder y control (1834-2007)*, Madrid, Ministerio de Educación, Política Social y Deporte. Secretaría General de Educación, 2008, p. 172.

²⁰ Morente, *La depuración franquista del magisterio público. Un estado de la cuestión*, cit., p. 680.

²¹ *Ibid.*

²² O'Malley, *La educación en la España de Franco*, cit.; A. Mayordomo Pérez, J. M. Fernández Soria, *Educación, cultura política, causa pública. Una lectura histórica*, «Revista Española de Pedagogía», vol. 71, n. 256, 2013, pp. 423-440.

formación inicial se realizaron actividades de preparación ideológica (al margen de la realizada con el colectivo profesional). En este sentido junto a las acciones formativas puestas en marcha por la administración educativa, destacar el fundamental papel desempeñado por la iglesia y por la falange, en la formación político-ideológica del magisterio. Además la labor del magisterio trascendía los límites de la escuela. En ocasiones, se le exigía la realización de actividades con las familias y en el vecindario destinadas a afirmar los sentimientos religiosos y patrióticos de la población. Cabe destacar que en los inicios del franquismo también se exaltaba el ruralismo. Se valoraba la vida tradicional y el espacio agrario como parte de la esencia española mientras se criticaba lo urbano. La cultura urbana se asociaba a lo moderno y se percibía como un elemento perturbador. En ese entorno la «talla intelectual» del magisterio representaba la cultura y se erigía en autoridad pedagógica. Sus conocimientos pedagógicos, científicos, sus valores éticos y su capacidad personal les avalaban para el ejercicio profesional como educadores. La imagen de las maestras y de los maestros como personas ejemplares, con arreglo a los postulados morales e ideológicos del régimen, les confería y revestía de autoridad.

En esta época, especialmente en las instituciones educativas, se veló por mantener al personal afecto al régimen. Los valores democráticos estaban ausentes, además de que las bibliotecas de las escuelas de magisterio habían sido depuradas como lo fueron sus docentes²³. Las obras de los grandes pedagogos universales estaban incluidas en la lista de libros prohibidos, debido a la incompatibilidad de los ideales democráticos con las ideas del régimen y los objetivos de formar un profesional al servicio de la patria²⁴. La formación del magisterio se caracterizó por un marcado carácter patriótico y escaso nivel teórico y práctico. Se aplicaba una enseñanza sexista y segregada, con formación diferenciada entre maestros y maestras, para atender a los roles diferenciados reflejo de la sociedad española del momento. Los programas formativos reflejan la evolución de sus itinerarios: uno de carácter más ideológico profesional correspondiente al primer franquismo y, otro de carácter más pedagógico comienza a percibirse en la década de los años sesenta. Es importante tener en cuenta que los planes de estudio cambiaron al tiempo que el régimen político, fueron adaptados a las nuevas circunstancias sociales y actualizados para que la formación de los estudiantes. El programa supone un listado de materias curriculares que deben ser enseñadas así como determina la instrucción y contenidos de la formación académica.

²³ J.M. Fernández Soria, C. Agulló Díaz, *La depuración franquista del profesorado de las Escuelas Normales de Alicante, Castellón y Valencia*, «Revista de educación», n. 364, 2014, pp. 197-221; J. Cuesta (dir.), *La depuración de funcionarios bajo la dictadura franquista (1936-1975)*, Madrid, Fundación Largo Caballero, 2009.

²⁴ Viñao Frago, *La educación en el franquismo*, cit, p. 26.

2. *Diseño de programas curriculares para el magisterio*

El estado español, desde 1936, se propuso dar forma y contenido a las enseñanzas de acuerdo con sus valores ideológicos y principios dictatoriales, como hemos expresado anteriormente. El contra modelo educativo aplicado por el franquismo anuló la obra realizada por los gobiernos republicanos. Dictó sus propias leyes para regular los distintos niveles educativos, aunque se regía por la estructura de la ley Moyano (1857) no contó con una ley general de educación hasta 1970. Las instituciones educativas volvieron a la enseñanza confesional y a la segregación de género, a la separación de aulas y espacios académicos. La jerarquía y el autoritarismo marcaban todas las esferas de la vida españolas. En la práctica instruían una ciudadanía autoritaria y rechazo a otras culturas que no fuera el saber oficial. La construcción de una ciudadanía patriótica (inmodificable) y por la que debía dar la vida (todo por la patria). La religión resultó un aliado muy pertinente para educar y controlar a una población dócil y conservadora. La iglesia imponía su cosmovisión, formaba creyentes y súbditos. Se utilizaba la pedagogía que subrayaba el carácter dogmático del conocimiento mediante la memorización. En los planes de estudio se introdujo una pedagogía decimonónica de corte católica y nacionalista, recogida en las obras de Rufino Blanco, Padre Manjón y Ramón Ruiz Amado, con el objetivo de formar un tipo de maestro y de maestra tradicional que debía garantizar la transmisión de unos valores conservadores, religiosos y patrióticos para perpetuar un orden social basado en la jerarquía, la disciplina y el autoritarismo²⁵. De manera que el enfoque pedagógico se subrogaba a la política ideológica y así se refleja en el perfil del magisterio:

Importa la formación científica de los alumnos pero de nada serviría si esta formación científica no está al servicio de estos tres ideales: Dios, España y Nacionalindicalismo... Pero es que, junto a la dificultad de trabajar con materia rodeada de cizaña marxista, existe la dificultad de tener que ir creándose el instrumento de trabajo. Estamos construyendo una Ciencia y una Técnica pedagógicas, de contenido español y de sentido revolucionario. Y aquí no valen traducciones. No valen las pedanterías y barbarismos con que nos obsequiaban los botafumeiros de la Institución Libre de Enseñanza. Nuestra Pedagogía, la que estamos construyendo, la Nacionalindicalista, ha de ser nuestra, es decir: católica, tradicional y revolucionaria²⁶.

²⁵ H. Escolar, *La cultura durante la Guerra Civil*, Madrid, Alhambra, 1987. El poder eclesiástico no tuvo escrúpulos para recuperar los privilegios perdidos, apoyó una Guerra Civil al lado de los vencedores y controló la educación y la vida de los españoles. De la siguiente forma lo expresa Hipólito Escolar (p. 206): «Las bodas entre la Iglesia y el régimen franquista supusieron muchos años de mutuo amor. Además de prestar con los capellanes castrenses auxilios espirituales en las unidades militares..., bendecía los actos oficiales..., recibía bajo palio a Franco... y facilitó la ruptura del cerco que las potencias vencedoras impusieron a Franco... A cambio pudo hacer y deshacer a su gusto en el Ministerio de Educación Nacional y pudo obligar al país a vivir en un triste oscurantismo».

²⁶ *El Maestro Nacionalindicalista*, «Revista Nacional de Educación», vol. 4, 1941, pp. 101-104.

El carácter confesional católico del régimen dictatorial se hizo patente desde los inicios de la sublevación. Desde el aparato del Estado, con posiciones fundamentalistas, se proclamó la regeneración del catolicismo, se esforzó en modelar las conciencias y en la reconstrucción de los valores tradicionales de la pedagogía. La exclusividad de la enseñanza católica quedó reflejada en las disposiciones oficiales y constituyó el discurso recurrente de las autoridades. El ministro de Educación Nacional José Ibáñez Martín (1939-1951) expresó «con la victoria de nuestro Ejército ha sido derrocado el régimen laicista y, por tanto, el Ministerio de Educación Nacional tiene el ineludible deber de restaurar la legislación que permita obtener el título de Maestro a aquellas personas que por su espíritu católico no pudieron alcanzarlo en el nefasto periodo republicano»²⁷. De manera que se dictaron normas específicas para los maestros y maestras tituladas con el Plan Profesional de 1931, así como para el alumnado egresados de dicho plan, al objeto de que cursarán y aprobarán la materia de Religión²⁸. Así el Ministerio desde el verano de 1937 convocó cursillos de dos semanas de duración para los maestros formados en el plan profesional de 1931.

En general, la formación del magisterio se caracterizó por un marcado carácter patriótico y escaso nivel teórico y práctico. Se aplicaba una enseñanza sexista y segregada, con un currículo que incluía materias distintas, para un modelo diferenciado entre maestros y maestras, que reflejaban la feminidad y masculinidad de acuerdo a los roles que marcaba la sociedad española del momento. Los programas formativos reflejan uno de carácter más ideológico profesional correspondiente al primer franquismo y, otro de carácter más pedagógico que comienza a percibirse en la década de los años sesenta. La legislación se convirtió en un instrumento de poder y control del colectivo. La diversidad de planes de estudio refleja la evolución del régimen y al mismo tiempo las precariedades existentes en la formación inicial así como las distancias entre la ideología y la realidad social. Una trayectoria que se concretó en el diseño de diferentes modelos de aprendices de maestros y maestras (Plan de 1942, 1945, 1950, 1967 y 1971). Cinco planes de estudio, al margen de las adaptaciones curriculares realizadas durante el periodo de guerra y de la posguerra, que diseñaron el perfil y la identidad del magisterio primario de acuerdo a los intereses y prioridades. En suma, las construcciones de los saberes, en las formas concretas de organizar el universo de conocimientos, que debían integrar la capacitación inicial de maestros y maestras de acuerdo con los postulados del régimen.

²⁷ Decreto de 10 de febrero de 1940. Preámbulo. Restablece el art. 28 del Real Decreto de 30 de agosto de 1914 (sobre reorganización de las Escuelas Normales).

²⁸ Circular del 12 de febrero de 1940. Al respecto establecía: «Los alumnos y alumnas del Grado Profesional deberán aprobar la asignatura de Doctrina Cristiana e Historia Sagrada que determina el artículo 4º de la Orden de 14 de julio de 1939 y la de 28 de diciembre del mismo año como formando parte del precipitado plan, no pudiendo invocar el derecho de conmutación por hallarse en suspenso estas concesiones».

A lo anterior añadir que en 1940 se dispuso la modalidad de formación del magisterio conocida como «Plan Bachiller». Se abrió así la oportunidad para las personas tituladas en bachillerato de realizar un curso único, específico e intensivo, de cinco meses de duración; tras la superación del mismo se les expediría la titulación de magisterio. Para ello tenían que cursar las materias de Religión e Historia Sagrada, Religión y Moral, Historia de la Pedagogía, Caligrafía, Labores y Economía doméstica (maestras), Música, Pedagogía y Prácticas de Enseñanza. El resto de materias se convalidaban de acuerdo con el plan de estudios de magisterio de 1914 y también con lo fijado en el Decreto 10 de febrero de 1940. Dicho curso se inició el 5 de marzo y concluyó el 31 de julio de 1940 y estuvo vigente dos años, es decir hasta 1941. De acuerdo con sus principios programáticos se estableció un programa con un currículo diferenciado por sexos, configurando un modelo magisterial orientado a la masculinidad y otro a la feminidad.

3. *Primer programa de estudios para el magisterio: Plan de 1942*

En el contexto de un estado autoritario, fortalecido con los postulados ideológicos y la represión, se requería del magisterio para que garantizara la transmisión de sus principios con el objetivo de que las generaciones venideras fueran sus acérrimas defensoras. La importancia de regular la capacitación del magisterio y del funcionamiento de las instituciones formadoras se recogió en la Orden Ministerial de 24 de septiembre de 1942, a través de la cual se aprobaba al plan de estudios provisional para las escuelas de magisterio. Se le conoce como «plan provisional», porque se elaboró pensando en restaurar la actividad académica en las instituciones formadoras del magisterio mientras se aprobaba la ley de enseñanza primaria²⁹. Constituye el primer programa curricular aprobado por la legislación franquista para magisterio, que respondía a los esquemas del gobierno militar, donde destacaba la figura del maestro y la maestra instruidos y adoctrinados en el pensamiento nacional católico. El acceso a las escuelas de magisterio se realizaba con los conocimientos adquiridos en la escuela primaria. De manera que con 12 años se podía realizar la prueba de ingreso para optar a dichos estudios, según estipulaba la Orden ministerial de 24 de septiembre de 1942. La ley definía el perfil del magisterio, su especialización pedagógica teórica y práctica. Si bien se trataba de un plan de estudios de carácter cultural, las Ciencias de la Educación ocupaban un 22,2% en el currículum académico. La formación de maestros y maestras pretendía el objetivo de consagrar un profesional de mediana cultura y alta preparación moral, religiosa y patriótica. Tanto la religión como la historia y la educación

²⁹ Ávila, Holgado, *Formación del Magisterio en España*, cit. p. 176.

patriótica ensalzaban hechos del pasado que sustentaban el régimen. El Plan de estudio de 1942 se estructuraba en cuatro cursos académicos. Los tres primeros cursos comprendían la formación cultural y el 4º se dedicaba a la formación profesional. Así las asignaturas de carácter pedagógico y psicológico se cursaban en cuarto curso, según lo dispuesto en la Orden ministerial de 24 de octubre de 1945. La Religión estaba presente en los cuatro cursos, en cambio las enseñanzas patrióticas se situaban en 1º y 2º. En 1º se denominaba Enseñanza Patriótica y en 2º Historia y Educación Patriótica. El Reglamento de las Escuelas del Magisterio, de 9 de octubre de 1945, establece diferencias curriculares: «Las alumnas, además, habrán de seguir obligatoriamente un curso de Enseñanzas del Hogar. Los alumnos varones elegirán, obligatoriamente, otros dos cursos prácticos entre éstos: idiomas (francés e inglés); cantos escolares; enseñanzas artísticas; organizaciones postescolares. Las alumnas elegirán sólo, obligatoriamente, uno de estos cursos».

Según las directrices del plan, con la referida instrucción sobre las materias mencionadas, los alumnos y alumnas tenían la obligación de aprender dichos contenidos. En el desarrollo del programa de estudios se incluye, además de la formación, el entrenamiento de los futuros profesionales. El periodo de Prácticas se redujo a diez días en el último curso, sin explicitar la necesidad de realizarlas en un centro educativo. Hecho que denota el escaso interés por la formación profesional de los maestros y maestras, por la metodología y la didáctica, al tiempo que refleja la involución pedagógica. Además la regresión metodológica, el dogmatismo implicaba el uso de la pedagogía tradicional afianzada en los libros de texto como transmisores de conocimiento, donde se reflejaban los ideales del nacionalcatolicismo. El interés por las cuestiones de carácter ideológico desplazaba a la metodología, no preocupaba la involución pedagógica solo los planteamientos del nacionalcatolicismo. Dado el papel fundamental de maestros y maestras en la transmisión de contenidos los principios ideológicos, con la intención de concretar la acción y dirigirla, en el diseño curricular que se aplicaba a las enseñanzas se recogían en los manuales empleados en la formación inicial y, evidentemente, en los manuales escolares para el proceso de enseñanza aprendizaje.

4. *Plan de estudios de 1945. Un programa para el sacerdocio de la educación*

Con la aprobación de la Ley de Educación Primaria de 1945 se afianzó el catolicismo frente a la merma de la influencia del falangismo, tras la derrota de los fascismos alemán e italiano en la segunda guerra mundial³⁰. Para una escuela

³⁰ José Ibáñez Martín, ministro de Educación Nacional (1939-1951), en su discurso de presentación de la ley a las Cortes defendió la iglesia católica: «La Ley es católica, sencillamente

católica la formación del magisterio tenía que ser necesariamente católica. Desde las esferas oficiales se insistía en la importancia del «apostolado del magisterio» y en el «sacerdocio de la educación». Ibáñez Marín, Ministro de Educación Nacional, en el discurso de presentación de la Ley de Enseñanza Primaria de 1945 dijo que: «la vocación del maestro entraña un espíritu de servicio a Dios y a la Patria y ha de ser suscitada, estimulada y dirigida con el mismo celo y empeño de las vocaciones apostólicas». El maestro tenía un deber «sagrado» que cumplir, tenía una «misión de amor y apostolado», era una especie de “sacerdote” al servicio de la religión y la patria, según el mensaje que dirigió al magisterio el Jefe del Estado en 1937. La Ley de Enseñanza Primaria de 17 de julio de 1945, en su artículo 59 propone convertir las Escuelas de Magisterio en espacios en los que se despierten y vigoricen las dotes vocacionales del alumnado y el sentimiento religioso y humano de todo educador, así como un auténtico espíritu nacional en servicio de unidad de la Patria. El preámbulo de la Ley de Educación Primaria de 1945 destaca la formación del magisterio y dedica todo el capítulo II a la preparación y capacitación del magisterio; incide en los conocimientos generales e instrumentales adquiridos en el bachillerato y los pedagógicos que recibe en las instituciones de magisterio, con una metodología adecuada para «despertar y vigorizar las dotes vocacionales de los alumnos, infundirles el espíritu de su noble profesión y el sentimiento religioso y humano propio de todo educador, capacitarles en las técnicas y conocimientos científicos de orden psicológico y pedagógico, a formar un auténtico espíritu nacional en servicio de la unidad de la Patria, espíritu que tienen los alumnos la obligación de transmitir»³¹.

Respecto a la organización interna, aparte de las horas lectivas dedicadas a las enseñanzas y prácticas, tenían cabida también las «actividades dirigidas a formar al maestro en el orden religioso, patriótico, físico y moral»³². La premura para implantar la ley implicó dictar una serie de medidas, estipuladas en la Orden Ministerial de 9 de octubre de 1945, que tuvieron repercusión en las escuelas de magisterio con la finalidad de regular su funcionamiento, anticipando el Plan de Estudios, lo que implica un periodo de transitoriedad en los mismos. El magisterio sufrió un retroceso en su preparación³³. El servicio a la patria y a la religión eran los referentes fundamentales en la formación del

porque nuestro Régimen lo es. Y ello sirva de lección a cuantos rebuscan signos inequívocos en la immaculada ideología y actividad consecuente del Estado que Franco acaudilla. Que si el Estado hubo de surgir de una Cruzada de fe, en la que era necesario restablecer por la victoria de las armas los sagrados ideales de nuestra Religión, conculcados por el enemigo, la ejecutoria política más definida de sus gobernantes ha sido precisamente la de acusar en sus leyes y en su obra restauradora el concepto católico de la vida». Ley de Educación Primaria (1945), Madrid, Magisterio Español, p. 5.

³¹ Ley de Educación Primaria de 19 de julio de 1945, p. 45.

³² *Ibid.*, art. 59.

³³ Peralta Ortiz, *Los proyectos sobre los estudios de magisterio en los comienzos del franquismo*, cit., pp. 69-86.

magisterio, imponía la vocación cristiana y patriótica, y exigía la acreditación de buena conducta moral y religiosa para acceder a los estudios. La Ley de Educación Primaria de 1945, en relación al plan anterior, aumentó las exigencias para el ingreso en las escuelas de magisterios; fijó la edad de acceso a los catorce años (se retrasó en dos años respecto al anterior plan de estudios), junto al requisito de poseer la titulación de bachillerato elemental (tener aprobados los cuatro primeros años del bachillerato) debían superar un examen de ingreso. En el artículo 63 de dicha ley constaba que el examen pretendía «comprobar la formación cultural de aspirante». Para las pruebas de ingreso se desarrolló una normativa con el objeto de regular dichas pruebas y el tipo de ejercicio a realizar según la Orden Ministerial de 18 de julio de 1945 (referida a la convocatoria de examen para ingreso en las Escuelas de Magisterio). Los aspirantes debían superar varios ejercicios: redacción de un tema (a elegir entre el temario de Religión, Historia o Geografía), resolución de dos problemas de matemáticas, análisis sintáctico gramatical y traducción de un texto en lengua francesa. A lo anterior, añadir el examen de labores para las alumnas.

En la estructura del plan de 1945 los estudios de magisterio constaban de tres cursos y una reválida final para poder obtener el título. Los programas de enseñanza se ajustaban a los cuestionarios publicados en 1942³⁴. El currículo incluyó las materias de Lengua Española, Geografía, Historia, Matemáticas, Ciencias de la Naturaleza, Caligrafía, Religión, Educación Patriótica, Lengua Francesa y Enseñanzas Artísticas. Además de las materias específicas según el sexo: Gimnasia, Recreos dirigidos, Labores y Enseñanzas del Hogar para las alumnas; Gimnasia, Recreos dirigidos y Trabajos Manuales para los alumnos. Igualmente los contenidos de la materia de Educación Patriótica estaban matizados según el sexo. Las prácticas escolares en escuelas anejas y la asistencia a campamentos (alumnos) o albergues (alumnas), se consideraban fundamentales para la formación de los aspirantes al magisterio. En el plan de estudios de 1945, sólo se establecieron cincuenta horas de Prácticas repartidas en los tres cursos elementales. Las Prácticas de Enseñanza continuaron subestimadas y con escasa dedicación, aunque mejoraron respecto al programa anterior. Además todo el alumnado tenía que realizar un curso de especialización profesional entre los ofertados. Podían elegir entre: formación agrícola, industrial o mercantil. Así mismo, en cumplimiento con la Orden de 9 de octubre de 1945, los alumnos podían optar a dos cursos prácticos a elegir entre las asignaturas de: Idiomas (Francés o Inglés), Enseñanzas artísticas, Organizaciones “postescolares” o Cantos escolares. Mientras que las alumnas sólo tenían la opción de elegir una de ellas para compensar la obligatoriedad de Enseñanzas del Hogar³⁵.

³⁴ Los cuestionarios se publicaron según disposición de la Orden de 30 de octubre de 1942. BOE, nº 309, 5 de noviembre de 1942, pp. 8959-8965.

³⁵ Orden de 9 de octubre de 1945. BOE, nº 284, 11 e octubre de 1945, p. 2247.

El régimen de enseñanza en la época permitía alcanzar las respectivas titulaciones a través del sistema de enseñanza libre. Las escuelas de magisterio acogieron dos modalidades de enseñanza, oficial y libre. La diferencia entre una y otra radicaba en que mientras en la primera se asistía regularmente a clase, en el segundo caso no se asistía. Además los estudiantes tenían un calendario de exámenes diferenciado según fuera su adscripción. Esta doble modalidad de enseñanza permaneció funcionando hasta la entrada en vigor la Ley General de Educación de 1970. Otra de las características de estos estudios fue la feminización, pues la presencia de mujeres frente a la de hombres era notable. La baja matrícula de alumnado fue una de las características en estos años, especialmente en el caso de alumnado masculino. El magisterio era una profesión poco valorada entre los hombres al estar mal retribuida. Sin embargo, el número de admisiones estaba en relación a las necesidades reales, de acuerdo con la demanda de maestros y maestras necesarias para atender las escuelas.

5. Plan de Estudios de 1950. La consolidación de la formación ideológica

El desarrollo de la Ley de Educación Primaria de 1945 requería a un magisterio formado en sus principios y contenidos. La reorganización de los centros se orientó a esa finalidad. El papel de la iglesia reforzado en la educación, interviniendo en los asuntos educativos, se justificaba por la subsidiaridad del Estado en materia educativa al dedicarse a la tarea urgente de reconstrucción nacional, tanto a nivel económico (fomento de la producción y del comercio) como de infraestructuras (red viaria, viviendas). La entrega de la educación al poder eclesiástico significó amplias atribuciones y competencias educativas mientras el Estado limitaba sus acciones³⁶. El nuevo diseño curricular mejoró la capacitación inicial del magisterio, elevó la categoría del magisterio y exigió el título de bachillerato elemental para acceder a estos estudios. Todas las asignaturas, exceptuando las materias estrictamente de Ciencias, estaban impregnadas de los principios del nacionalcatolicismo. Es decir, que tenían una presencia de modo transversal de los contenidos religioso-patrióticos. Por ejemplo, la Pedagogía se caracterizaba por ser patriótica y católica, basada en la Enciclopedia Divina Illius Magistri. Todos programas y libros estaban impregnados por el espíritu católico. Además de la presencia de la asignatura

³⁶ Revista de Educación, Balance de cuatro años de política educacional (1951-1955). Madrid, MEC, 1956, pp. 29-30. En el balance se explicaba que había «cierto inhibicionismo en materia educacional» debido a los «resabios de ideas anacrónicas sobre la actividad del Estado ante el problema de la enseñanza y, en general, de la cultura» porque se consideraba que la educación era «un gasto improductivo». Aclaraba el error de ese argumento «si se consideran los bienes espirituales que se desprenden de ella e, incluso, determinados tipos de enseñanza son evidentemente reproductivos».

de Religión obligatoria en los tres cursos del magisterio, tanto para maestras como maestros. En los cuestionarios de 1953 los contenidos de la materia de Religión eran idénticos para los alumnos de ambos sexos, excepto en algún tipo de metodología de aprendizaje de oraciones y cantos. Los cuestionarios de Pedagogía, junto a los temas religioso patrióticos, incorporaba contenidos sexistas en función de la dualidad de los roles sociales definidos en aquel entonces. El ideal de masculinidad y feminidad con sesgos de género marcaban el diseño de los programas educativos.

Por Decreto de 7 de julio de 1950, se aprueba el Reglamento de las Escuelas de Magisterio, con el objeto de regular las normas para estos estudios y presta singular atención a las escuelas de magisterio, tal como recogemos en las líneas siguientes: «las Escuelas del Magisterio serán no sólo Centros docentes, sino fundamentalmente formativos y educativos, donde el alumno encuentre como otro hogar en que se forme y capacite para la vida social y profesional. La educación física, intelectual, moral y religiosa, político-social, patriótica, artística, profesional y cultivo y fomento de la educación, debe ser la gran tarea de estos Centros, a los que España encomienda misión tan trascendental como lo es la de moldear a los que han de ser, a su vez, educadores de la niñez»³⁷. El Plan de 1950 introdujo algunas novedades respecto a etapas anteriores, según se especificaba en el capítulo VI del Reglamento de Escuelas del Magisterio³⁸. Se incluyeron nuevas materias y otras ya existentes mejoraron su posición, y se reconoce la importancia de las metodologías de cada materia. Se incluyeron las asignaturas de Fisiología e Higiene en 1º curso y en 2º curso se introdujeron los Idiomas. En el currículo figuraban las Prácticas de enseñanza como asignatura. Además el programa de estudios lo conformaban las asignaturas de Matemáticas, Física y Química, Geografía, Historia, Filosofía, Pedagogía, Psicología, Lengua e Historia de la Literatura, Religión, Educación Física y Enseñanzas del Hogar para las alumnas, mientras los alumnos estudiaban Formación político-social durante los tres cursos. Las asignaturas de Labores y Caligrafía sólo se impartían en los dos primeros cursos. Dibujo y Música correspondían a segundo y tercer curso. Al finalizar, tras haber superado los tres cursos académicos tenían que realizar el examen de una reválida final. Según Ávila y Holgado, el plan de estudios refleja el interés por la metodología

³⁷ Artículo 1º. Reglamento para las Escuelas de Magisterio de 1950.

³⁸ Reglamento para las Escuelas de Magisterio (Decreto de 7 de julio de 1950, B.O.E. de 7 de agosto de 1950 firmado por el ministro José Ibáñez Marín). En el articulado de dicho Reglamento se fijan las normas reguladoras: «Art. 10: Examen de ingreso:... g) Las alumnas realizarán, además, ante el Tribunal, un ejercicio de Labores, según Cuestionario. Art. 31: Plan de Estudios: 1º, 2º y 3º Curso: Formación político-social (alumnos) y Enseñanzas del Hogar (alumnas); 1º y 2º Curso: Labores o trabajos manuales. Art. 63: Se organizará en cada Escuela un taller a cargo del profesor de trabajos manuales, en el que los alumnos puedan realizar trabajos en madera, hierro, corcho, hojalata, arcilla y otros materiales [...]. Art. 107: En las Escuelas de Maestros habrá también un profesor de trabajos manuales y prácticas de taller, y en la de Maestras, una profesora de labores y Enseñanzas del Hogar».

y atiende a un conjunto de materias relacionados con las formas de enseñar, aunque los contenidos eran “menos extensos” al ampliarse la nómina de temas de las respectivas asignaturas³⁹. En este sentido se publicaron los cuestionarios correspondientes. Lo más novedoso fue la publicación de una serie de normas pedagógicas e higiénicas para el desarrollo escolar. El Reglamento incide en una serie de normas específica y en la importancia de mejorar la formación cultural restando espacio a la capacitación pedagógico-profesional, acusada con el protagonismo de las denominadas «disciplinas especiales» (educación religiosa, formación política y educación física). La propia normativa refería a la «misión vital del Maestro, de servir al hombre, como obra divina predilecta, perfeccionándolo con la educación para acercarlo a Dios y hacerlo útil a su Patria, constituye a aquél en nervio y eje de la nueva escuela española».

Cumplido el ciclo formativo del Plan de 1950, y a pesar de las novedades introducidas y de sus aspiraciones de elevar la formación cultural del magisterio que repercutiría en su proyección escolar y, por tanto, en la mejora del nivel educativo de España, presentaba muchas deficiencias que los gestores públicos pretendieron corregir. Para ello diseñaron un nuevo programa formativo.

6. *Plan de Estudios de 1967, un programa profesionalizador*

La política de modernización educativa fue paralela a los procesos de cambio económico y social. La educación necesitaba ser reformada y generar una población formada acorde con la industrialización que iniciaba el país. La escuela tenía que responder a esa realidad y ser compatible con el nivel de los países en desarrollo. El tradicionalismo pedagógico era incompatible con los tiempos económicos y la caducada escuela precisaba de una reforma. Junto a la apertura científica y a las nuevas metodologías e innovaciones hay que destacar el cambio operado, a partir de la reforma impulsada por los cuestionarios de 1965, con los textos didácticos⁴⁰. El periodo de Lora Tamayo en el ministerio (1964-1968) representa los inicios de la tecnocracia y la aplicación del Primer Plan de Desarrollo (1964-1967), supuso también el diseño de un perfil técnico del magisterio de acuerdo con las nuevas demandas sociales⁴¹. Desde el propio

³⁹ Ávila Fernández, Holgado Barroso, *Formación del Magisterio en España. La legislación normalista como instrumento de poder y control (1834-2007)*, cit., p. 186.

⁴⁰ Escolano Benito, *Discurso ideológico, modernización técnica y pedagógica crítica durante el franquismo*, cit., p. 14.

⁴¹ M. Lora Tamayo, *Política educativa de una etapa 1962-1968*, Madrid, Editora Nacional, 1974, p. 38. Al respecto decía el ministro: «la formación del maestro exige solidez de conocimientos en las disciplinas básicas, metodología actual de la enseñanza en cada una de ellas y suficiente fundamentación en psicología, el maestro tiene en su función diaria la doble misión de transmitir conocimientos por una u otra vía y, en la compulsa de sus efectos, ir diferenciando calidades en

Ministerio de Educación se refería a la escasa preparación pedagógica de los maestros y en aras a su mejora se introducen en su ciclo de estudios: «el maestro debe ser un educador, y para ello tiene que conocer suficientemente las ciencias de la educación, base y fundamento de la didáctica»⁴². La renovación educativa era necesaria y respondía a las demandas sociales. Igual que se rebaja la presencia curricular de los contenidos ideológicos del nacionalcatolicismo, respecto a las primeras décadas⁴³. No desapareció la materia de formación política pero se introdujeron elementos didácticos con un enfoque más actualizado. La Falange de las Juntas de Ofensiva Nacional Sindicalista a través del Frente de Juventudes y la Sección Femenina continuó desempeñando el control ideológico. Sus dictámenes eran indispensables para la aprobación de los textos didácticos de religión, formación del espíritu nacional y educación cívica.

Por medio de la Orden Ministerial de 1 de julio de 1967 y el Decreto 193 del 2 de febrero de 1967 se reestructuraron estos estudios aportando nuevo diseño. Se trata de un plan de estudios que mantenía cierta similitud con el plan de estudios de 1931, ampliaba la presencia de materias pedagógicas, que equivalía a un 25% de la formación. Los gestores públicos mejoraron notablemente el programa académico respecto a los anteriores. El rango del magisterio continuó siendo de carácter profesional, pero los requisitos de acceso aumentaron y fue necesario poseer el título de bachiller superior para poder ingresar en las escuelas de magisterio. El programa curricular incluía Pedagogía, Psicología y Prácticas de enseñanza (comprendía «estudios pedagógicos, psicológicos y prácticas de enseñanza, con algunos cursos de hechos sociales, artes plásticas y dinámicas, educación cívica y sanitaria»). Le concedió una importante reserva horaria a las didácticas específicas, hecho que recortó espacio a las Ciencias de la Educación con la consecuente deficiente preparación pedagógica en la formación inicial. En 1º curso se incluían las asignaturas de Pedagogía General y Diferencial, Historia de la Educación y Pedagogía Experimental con seminarios de ampliación y complemento; Psicología General y Evolutiva en seminarios complementarios; y Filosofía. En 2º curso Didáctica General, Orientación y Organización Escolar con seminarios complementarios; Psicología de la Educación y Sociología de la Educación con seminarios complementarios. Prácticas de Enseñanza, organizadas y controladas.

Tanto alumnos como alumnas recibían formación en las escuelas de magisterio, con clases teóricas que se impartían durante dos horas semanales en los dos primeros años como clase colectiva y, una práctica, en la escuela

el niño para orientarle en una dirección conveniente a sus manifestadas aptitudes [...] junto a esa base de conocimientos fundamentales, hay que proporcionarles los necesarios para una excelente preparación en el orden político, religioso, moral y sociológico, pero íntimamente enlazados a través de la inmutable doctrina de la Iglesia».

⁴² Ministerio de Educación Nacional, *Las necesidades de educación y el desarrollo económico-social de España* (Proyecto Regional Mediterráneo), Madrid, MEN/OCDE, 1963, p. 53.

⁴³ P. Preston, *El holocausto español*, Barcelona, Círculo de Lectores, 2011, pp. 112-115.

aneja. Se realizaba en dos fases, en la primera, bajo la tutoría de los profesores de magisterio y en la segunda bajo la supervisión de los maestros y/o de las maestras de la escuela nacional donde realizaban las prácticas. En el 3º año de la carrera realizaban las prácticas durante el curso completo en una escuela o colegio nacional y además recibían un complemento salarial por el trabajo desempeñado. Resultó un plan de estudios breve en el tiempo a juzgar por su vigencia. Cuatro años más tarde una nueva regulación modificó la estructura del magisterio. Las orientaciones y normas metodológicas reflejan la transformación de la enseñanza con la incorporación de nuevos términos al uso pedagógico, una evolución que se proyectó en una serie de modificaciones curriculares y en la praxis educativa⁴⁴. Todas las materias precisaban de recursos de externas para su desarrollo y resultaban claves en el proceso de enseñanza aprendizaje. El lenguaje tecnocrático, reflejo de los objetivos de la nueva política, comenzó a circular en los ambientes educativos. Sin romper con los principios del franquismo se conectaba con las innovaciones emprendidas en Europa en esa década, aunque con cierto retraso. En un contexto de cambio el sistema de enseñanza tradicional comenzaba a transformarse, producto del languidecimiento del aparato escolar y su estructura. De forma paulatina, la legislación actuará como un revulsivo frente a las contestaciones y resistencias, al tiempo que se dinamiza el uso terminológico se activa el modelo tecnocrático. La Ley General de Educación y Financiamiento de la Reforma Educativa no incluye la formación del magisterio. Si bien en el Libro Blanco (1969) se reconocía su importancia y necesidad de abordar los cambios necesarios, la normativa no lo contemplaba. El diagnóstico de mejora para la formación del magisterio se estableció más tarde en el denominado Plan Experimental de 1971.

7. El modelo tecnocrático: El plan de estudios de 1971

La Ley General de Educación de 1970, aprobada en el tardo franquismo, introdujo innovaciones para modernizar la educación y la estructura educativa que ya no respondía a las necesidades reales de la población española⁴⁵. Estableció la enseñanza mixta y unificó el programa de estudios para uno y otro sexo en

⁴⁴ Resolución de 27 de julio de 1967, por la que se dispone la aplicación de nuevos Cuestionarios en las Escuelas de Magisterio a partir del curso 1967-1968. Esta disposición incidía en la renovación metodológica, y por tal cuestión era importante «el estudio analítico de los medios y recursos didácticos al servicio de todo aprendizaje natural, ambiental y escolar... En esta parte van incluidos en todo su valor los recursos audiovisuales que las nuevas técnicas de información y formación de masas reclaman, porque éstas han de ser en un futuro decisivas incluso en la formación escolar».

⁴⁵ M. Puelles Benítez, *Educación e ideología en la España contemporánea*, Madrid, Tecnos, 2010, p. 445.

todos los niveles educativos. El modelo femenino que se había configurado en la época se reconocía precario y de baja cualificación. Además el libro blanco reconocía la deficiente preparación de las mujeres⁴⁶ y la necesidad de elevar su nivel cultural⁴⁷. En la Ley se advierte la necesidad de introducir una reforma en la formación del magisterio. El preámbulo de la Ley General de Educación dice: «La formación y el perfeccionamiento continuado del profesorado, fundamental para mejorar el rendimiento y calidad del sistema educativo, donde cada docente se sienta solidario de esa acción renovadora y contribuya con su competencia profesional e imaginación. En el profesorado recaerá la responsabilidad más honrosa y difícil de la reforma». Para el magisterio se diseñó un plan de estudios a partir del discurso tecnocrático, con la implantación de un perfil profesional de carácter técnico nutrido con la nueva pedagogía⁴⁸. En el nuevo escenario técnico-científico la transformación epistemológica de la pedagogía estaba supeditada a ajustarse a los principios y valores del régimen.

⁴⁶ Ministerio de Educación y Ciencia, *La educación en España. Bases para una política educativa*, Madrid, M.E.C., n. 263, 1969, p. 122. Al respecto especificaba: «La situación descrita tiene como telón de fondo un conjunto de actitudes arraigadas en la sociedad española (algunas de las cuales van, afortunadamente, desapareciendo) que obstaculizan la promoción cultural y profesional de la mujer; entre estas actitudes se encuentra la de considerarla incapaz para desempeñar ciertos puestos de responsabilidad, lo que en unos casos se ha reflejado en un impedimento legal para acceder al desempeño de ciertas profesiones, y en otros ha dado lugar, simplemente, a lagunas de orden legal o reglamentario en relación con los trabajos que realizan o podrían realizar las mujeres».

⁴⁷ C. Flecha García, *Algunos aspectos sobre la mujer en la política educativa durante el régimen de Franco*, «Historia de la educación. Revista interuniversitaria», vol. 8, 1989, p. 79.

⁴⁸ F. Montilla, *Metodología y organización Escolar*, Valladolid, Gráficas Andrés Martín, 1966, p. 377. «La pedagogía moderna ha establecido cierto antagonismo entre lo que hicieron las generaciones precedentes y lo que intenta realizar la nuestra [...] la posición exacta no tiene más que una solución: sobre el marco inalterable de los fundamentos incommovibles de la Pedagogía tradicional se esboza la trama de una pedagogía de nuestros tiempos, eliminando lo verdaderamente anticuado e inútil de aquella y sustituyéndolo por formas nuevas, producto de verdaderas adquisiciones actuales»; Por su parte Mainer, escribe que «bajo el pretexto de revisar y glosar las tendencias de la ciencia pedagógica, racional y experimental al filo de los años cuarenta, García Hoz realiza un fascinante encaje legitimando la connivencia y complementariedad, por un lado, de la dirección política y espiritualista de la pedagogía racional o normativa (subrayando, lógicamente, el primado de la segunda sobre la primera) y por otro, de la dirección cuantitativa, centrada en el análisis factorial, de la pedagogía experimental o aplicada», en J. Mainer, *La forja de un campo profesional. Pedagogía y Didáctica de las Ciencias Sociales en España (1900-1970)*, Madrid, CSIC, 2009, p. 507. Sobre este particular se pueden consultar a M.J. Romero-Iruela, *La investigación-acción en la formación del profesorado*, «Revista Española de Documentación Científica», n. 34, 2011, pp. 597-614; J. Manso Ayuso, *Revisión histórica de la formación de maestros en España*, «Tendencias Pedagógicas», vol. 16, 2010, pp. 181-206; E. Macías Gómez, *La educación básica en España en los siglos XX y XXI. La función de la universidad en la formación de los maestros*, «Tendencias Pedagógicas», vol. 14, 2009, pp. 191-207; A. Terrón Bañuelos, *La profesionalización del magisterio en el tecno-franquismo: entre los valores eternos y la ciencia verdadera*, «Innovación Educativa», vol. 23, 2013, pp. 25-45; J.M. Román Sánchez, R. Cano González, *La formación de maestros en España (1838-2008). Necesidades sociales, competencias y planes de estudio*, «Educación XXI», vol. 11, 2008, pp. 73-101.

Se apuntalaba un modelo tecnocrático con sus objetivos, con la adquisición de una serie de técnicas y contenidos siguiendo el «paradigma tecnológico o positivista»⁴⁹ sin romper la base ideológica. La Ley General de Educación de 1970, junto al Plan de 1971, representó un avance significativo en el sistema educativo con una proyección tecnológica, en el planteamiento de concepciones educativas, didácticas y pedagógicas⁵⁰. Mejorar la preparación inicial implicó elevar la categoría a estudios universitarios y adscribirlos a las escuelas universitarias de formación del profesorado, transformando así a las antiguas escuelas de magisterio y haciendo desaparecer a unos centros centenarios. Los estudios tendrían una duración de tres años y contemplan el desarrollo de distintas especialidades (Ciencias, Ciencias Humanas, Filología, Educación Especial y Educación Preescolar), en correspondencia con las necesidades de la enseñanza primaria diversificada en etapas y áreas de conocimiento⁵¹. Sin embargo, en las especialidades de formación predominaba el carácter cultural sobre la capacitación profesional. Las materias de índole pedagógica así como las prácticas de enseñanza, estaban escasamente representadas en el plan de estudios. Después de aprobar los tres cursos académicos, la titulación que reciben los egresados es la de «Profesor/a de Enseñanza General Básica» cambiando la tradicional denominación de «Maestro /a de Educación Primaria»⁵². La formación del magisterio requería la adquisición de las habilidades necesarias que le permitiera transmitir los conocimientos a las nuevas generaciones en un proceso educativo fundamentado en los saberes impregnados de la ideología franquista con fuerte tendencia religiosa más que pedagógica⁵³.

El plan experimental de 1971, iniciado en aquellas escuelas que estaban situadas en las cabezas de los respectivos distritos universitarios, se extendió a todas las demás en el curso 1972-73. Las escuelas pasaron a denominarse

⁴⁹ R. Baelo Álvarez, A.R. Arias Gago, *La formación de maestros en España, de la teoría a la práctica*, «Tendencias pedagógicas», vol. 16, 2011, p. 114. El paradigma tecnológico o positivista: «esta perspectiva es una de la más influyente en la concepción del currículum hasta la actualidad. Deriva de una visión general de la ciencia como herramienta clave para resolver y controlar el proceso educativo. Con su desarrollo se trata de dar un mayor rigor y reconocimiento a la enseñanza. Se basa en el impulso de una pedagogía tecnocrática asentada en unos objetivos y en donde la enseñanza se concibe como una profesión que se debe de aprender por medio de la adquisición de una serie de técnicas y contenidos que van a permitir al futuro docente alcanzar los objetivos que se han prefijado de manera externa».

⁵⁰ T. González Pérez, *La transformation de l'éducation espagnole á la fin du franquisme. La loi générale de l'éducation et la formation d'instituteurs*, «History of Education & Children's Literature», vol. V, n. 1, 2010, pp. 337-351.

⁵¹ Ead., *La transformation de l'éducation espagnole á la fin du franquisme. La loi générale de l'éducation et la formation d'instituteurs*, cit., pp. 337-351; Ead., *La política de formación del profesorado en España: De la LGE a la LOGSE. Dilemas y controversias*, en Ead. (ed.), *Reformas educativas y formación de profesores*, Madrid, Biblioteca Nueva, 2015, pp. 81-105.

⁵² A. Molero Pintado, *Modelos de formación de maestros*, en González Pérez (ed.), *Reformas educativas y formación de profesores*, cit., p. 43.

⁵³ Baelo Álvarez, Arias Gago, *La formación de maestros en España, de la teoría a la práctica*, cit., p. 115.

Escuelas Universitarias de Formación del Profesorado de Enseñanza General Básica. Este plan exigía a los alumnos tener aprobado el Curso de Orientación Universitaria, también denominado COU, o bien otros estudios equivalentes. La transformación de las escuelas de magisterio en escuelas universitarias de formación del profesorado, y la elevación de los estudios al rango de diplomatura no modificaron sustancialmente los contenidos de los programas de estudio, pues las enseñanzas continuaban siendo modeladas por la enseñanza religiosa y patriótica. Los fundamentos ideológicos seguían vigentes en el ocaso del franquismo, si bien se debilitaba y el sistema daba señales de agotamiento⁵⁴. En el plano de la formación profesional priorizó en la Didáctica General y Especial, en detrimento de otras materias vinculadas con la educación, como sucedió con la unificación de la Historia de la Educación y Pedagogía y entre Sociología de la Educación y Filosofía. Las Prácticas de enseñanza estaban distribuidas en segundo y tercero, con mes y dos meses cada uno en un colegio público. Más tarde algunas escuelas universitarias optaron por concentrarlas en 3º curso.

La formación de los maestros y de las maestras incluía la educación patriótica, que constituía el adoctrinamiento político acorde con los postulados del nacional catolicismo, tal como venimos expresando⁵⁵. En esta asignatura de primer curso se enseñaba el significado de los conceptos Patria y patriotismo y los deberes que imponían, en consonancia con el Estado y la Nación. El sentimiento patriótico se consideraba un valor y se asociaba con símbolos como la bandera española, la raza española, el idioma español, la religiosidad y la catolicidad, en contraposición con las ideas contrarias al sentimiento patrio que se ligaban a conceptos perversos como eran: internacionalismo, materialismo y cosmopolitismo. Además era obligatorio realizar el Campamento para los alumnos y el Albergue para las alumnas, impartido por instructores de la Falange y de la Sección Femenina respectivamente. Estuvo en vigor hasta el curso 1975-1976, pues a partir del fallecimiento del dictador se evoluciona y se suprimen las materias y actividades de carácter ideológico-patrióticas. Uno de los rasgos fue la limitada formación psicopedagógica y escaso periodo de prácticas así como la especialización de tendencia tecnocrática, que constituyeron una de las críticas a las deficiencias del plan junto a la falta de instrucción e información del profesorado. El paradigma de formación tenía un enfoque didáctico tecnológico pero el profesorado universitario carecía de la preparación necesaria para desarrollar estas enseñanzas⁵⁶.

⁵⁴ M. Puelles Benítez, *Las grandes leyes educativas de los últimos doscientos años*, «Participación educativa», vol. 7, 2008, p. 10.

⁵⁵ Riquer i Permanyer, *La dictadura de Franco*, cit., p. 14.

⁵⁶ J.L. Mora García, *Maestros y Universidad: Veinticinco años de historia*, en A. Rodríguez Marcos, E. Sanz Lobo, M.V. Sotomayor Sáez (coords.), *La formación de los maestros en los países de la Unión Europea*, Madrid, Narcea, 1998, p. 134. Respecto a las orientaciones curriculares y los fundamentos básicos en la formación inicial, algunos opinaban que «en todo caso se consideró que los conocimientos adquiridos en el BUP (Bachillerato Unificado Polivalente) era base suficiente

Veinte años permaneció vigente este plan de estudios, con algunas variaciones en los contenidos, funcionó como plan experimental hasta 1977 (Orden de 13 de junio, BOE de 25 de junio), año en que se publicaron sus directrices. La plena integración universitaria de estos estudios no se realizó hasta 1983, con la entrada en vigor de la Ley de Reforma Universitaria (LRU). A la organización de los centros y al profesorado le afectó la reforma universitaria. La ley efectuó una división en los cuerpos docentes, catedráticos y titulares de universidad así como de catedráticos y titulares de escuelas universitarias. Los cambios experimentados por la sociedad española y avances generados con la aplicación de las políticas de la tecnocracia condujeron al camino de la transición y la democracia⁵⁷. El proceso de incorporación universitaria finalizó con el desarrollo de la Ley Orgánica de Ordenación General del Sistema Educativo. El Real Decreto 1440/1991, de 30 de agosto (BOE de 11 de octubre) estableció el título universitario de Maestro/Maestra en sus diversas especialidades y las directrices generales de los planes de estudio conducentes a su obtención, recuperando la antigua denominación de Maestro y Maestra.

Conclusiones

La implantación por la fuerza de la dictadura franquista eliminó el régimen democrático, supuso la desaparición del régimen republicano y de cualquier huella educativa para imponer su sistema de gobierno y su nuevo modelo educativo marcado por el «nacional-catolicismo». La ruptura radical con el modelo republicano, la consolidación de un sistema educativo con un férreo control ideológico y fuerte adoctrinamiento del magisterio se proyectó en la educación desde la infancia. El franquismo representó una fractura en el proceso de modernización educativa, al igual que en otros planos de la sociedad española. La dictadura conllevó el aislamiento del mundo exterior, ni siquiera había contactos con los países limítrofes. La pedagogía autárquica y etnocéntrica de las primeras décadas dio paso a las corrientes científicas internacionales, que se canalizaron a través de los movimientos de renovación pedagógica.

El recorrido histórico por cuarenta años de dictadura militar permite analizar el paradigma de formación del magisterio bajo la fórmula del nacionalcatolicismo. El estado español se propuso dar forma y contenido a las enseñanzas de acuerdo

para el maestro cuya formación exigía tan sólo de un breve ‘aggiornamento’ didáctico como si fuera el toque de distinción. Aun así, este Plan apenas mereció una especie de refrendo, en 1977, mediante el simple subrayado en el BOE (Boletín Oficial del Estado) de las áreas de conocimiento que debían cubrir la formación de profesores».

⁵⁷ T. González Pérez, *La formación de maestros durante la transición y la restauración democrática (1976-1986)*, «Revista interuniversitaria de formación del profesorado», n. 76, 2013, pp. 29-43.

con sus valores ideológicos y principios dictatoriales. A lo largo del periodo se acuñó un modelo de maestros y maestras sustentado en un desarrollo curricular de carácter religioso, patriótico, sexista y discriminatorio. No obstante, en el ocaso el plan de estudios de 1971 representó un avance que preludiaba síntomas de cambio. La Falange y la Sección Femenina se encargaron de modelar al maestro y a la maestra de acuerdo con los principios del nacionalcatolicismo, para que posteriormente educaran a las nuevas generaciones de españoles y españolas. Tanto maestros como maestras encarnaban el modelo a imitar por sus respectivos alumnos y alumnas, y como personas ejemplares su conducta debía ser intachable de acuerdo con el orden vigente. La construcción de la masculinidad y de la feminidad respondía a los intereses hegemónicos de la sociedad autoritaria, patriarcal y conservadora que asignaba roles sexuados, y se apoyaba en la superioridad de los varones frente a la subordinación de las mujeres. La dictadura ofrecía un reflejo del binomio masculino/femenino, de las categorías de género y sexualidad típicas de los fascismos, articulada en un sistema binario en el que una categoría aparece en términos de superioridad. Muestran la construcción binaria de sexo, género y orientación sexual de un estado dictatorial.

En aquel contexto, la educación segregada, desigualitaria y discriminatoria reproducía los cánones de una sociedad tradicional controlada por la iglesia y el poder militar. Los arquetipos de género y los discursos identitarios condicionaron la vida de generaciones de personas que tuvieron que amoldarse a las circunstancias impuestas. Mujeres y hombres se erigían como seres diametralmente opuestos en todos los sentidos, incluso por el papel que desempeñaban en el régimen franquista. El franquismo se ocupó de construir modelos patrióticos para las mujeres basados en figuras ejemplares de santas y reinas. Estos modelos excluían por definición la libertad de las mujeres, entendida como la apropiación de los saberes, lugares o formas propias de los varones. Igualmente hizo lo propio con los modelos masculinos, aunque ellos tenían el espacio público, el mundo del trabajo y la defensa de la patria. Los estudios sobre la masculinidad muestran que hacerse “hombre” forma parte de la socialización de género. Sus características están asociadas a las exigencias de la sociedad hacia su condición de hombre.

No obstante, la identidad profesional se fue transformando a lo largo del franquismo al ritmo que el régimen político evolucionaba y modificaba sus objetivos, conjugando tradición con modernidad, aunque sin apartarse de los postulados del nacionalcatolicismo. El magisterio experimentó cambios sustanciales a lo largo de su ciclo histórico. Transitó desde el sacerdocio de la educación de los inicios del régimen a la tecnocracia. Los cambios se iniciaron en el tardo franquismo asociados a la legislación educativa y al progreso cultural de determinados sectores sociales. El perfil profesional del magisterio, exigido por el nuevo escenario técnico-científico en el que pretendía avanzar la pedagogía española, respondía al languidecer del autoritarismo en el ocaso del régimen.

Among pastoral needs and commitment to the preservation of national identity: the Holy See and the Italian emigration abroad among the nineteenth and twentieth centuries*

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ABSTRACT: On the basis of a plurality of archival and print sources, the A. explores the role played by the Holy See in matters of assistance and pastoral care of the Italian emigrants abroad in the period from the second half of the nineteenth century, until the Second Vatican Council and the post-conciliar season. The A. documents how, at least until the second half of the eighties of the nineteenth century, the actions promoted by the Italian Church for the protection of emigrants were very limited and, on the whole, with an episodic and marginal character. The situation changed significantly over Leo XIII's and Pius X's pontificates. The latter, in particular, undertook actions not only in terms of the intensification of the initiatives and works of assistance and for the centralization of policies in support of the migrants' pastoral care, but also on that – equally crucial – of the recruitment and the cultural and spiritual education of the clergy intended to animate the religious life of the communities of Italian emigrants abroad. The commitment in favor of the refugees and prisoners of war exercised by the Holy See during the Second World War helped to develop within the Church a wider sensitivity so that the focus gradually shifted from the problem of the Italian emigration to that, more comprehensive and universal, of all those who, not only for economic reasons but also for reasons related to conflicts, natural disasters and persecution, were – and still are – forced to leave their places of origin and live away from their country (refugees, prisoners of war ecc.),

EET/TEE KEYWORDS: Catholic church; Emigration; Roman Curia; Italy; Europe; Latin America; United States; XIX-XXth Centuries.

* The article proposes, with extensive modifications and additions, the contribution already made in Portuguese in the Brazilian scientific journal «História da Educação», vol. XXI, n. 51, 2017.

Introduction

At the beginning of the eighties Gianfausto Rosoli, in a contribution on the role played by the Church in helping the Italians emigrated to Brazil, rightly stressed that the «emigration of huge masses of workers in the last century» had represented «something new for the Church» and constituted «a stimulus for establishing on new bases a renewed universality by a peaceful widening of the Catholic horizons», not failing also to underline as the progress made on this side had been «historically not easy»¹.

Studies on the history of emigration appeared in the last thirty years² have undoubtedly helped to highlight certain significant aspects of the work carried out by the Church in the area of pastoral and religious care for the Italians emigrated abroad³.

At the same time, the publication of unpublished and printed sources on the activity carried out by the church bodies taking charge of the spiritual and material needs of Italian emigration has laid the groundwork for a more comprehensive reconstruction of the dynamics and strategies that inspired the work of the Church in this area⁴.

¹ G. Rosoli, *Chiesa ed emigrati italiani in Brasile: 1880-1940*, in *Chiesa ed emigrazione italiana tra '800 e '900*, «Studi Emigrazione», vol. XIX, n. 66, 1982, p. 225.

² For an overview, even if limited to transoceanic migration, we should refer to the effective synthesis by E. Franzina, *Emigrazione transoceanica e ricerca storica in Italia: gli ultimi dieci anni (1978-1988)*, «Altreitalie. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. I, n. 1, 1989, pp. 6-57.

³ Here we only report the fundamental works published or edited by Gianfausto Rosoli on this matter: G. Rosoli, *La Chiesa di fronte al secolare fenomeno dell'emigrazione*, in *Per una pastorale dei migranti. Contributi in occasione del 75° della morte di mons. G.B. Scalabrini*, Roma, Direzione Generale dei Missionari Scalabriniani, 1980, pp. 47-73; Id. (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, Roma, Centro Studi Emigrazione, 1989; Id., *I movimenti di migrazione e i cattolici*, in E. Guerriero, A. Zambarbieri (edd.), *Storia della Chiesa. XXXII/1. La Chiesa e la società industriale (1878-1922)*, Milano, Paoline, 1990, pp. 497-526; Id., *Movimenti migratori e nuove forme di carità e di assistenza*, in M. Guasco, E. Guerriero, F. Traniello (edd.), *Storia della Chiesa. XXXIII. I cattolici nel mondo contemporaneo (1922-1958)*, Milano, Paoline, 1990, pp. 454-471; Id., *Insieme oltre le frontiere. Momenti e figure di storia della Chiesa tra gli emigrati italiani nei secoli XIX e XX*, Caltanissetta-Roma, Salvatore Sciascia, 1996.

⁴ For what concerns the publication of unpublished print sources of particular value, we only mention: C. Marcora (ed.), *Carteggio Scalabrini Bonomelli (1868-1905)*, Roma, Studium, 1983; Pontificia Commissione per la Pastorale delle Migrazioni e del Turismo (Vaticano), *Chiesa e mobilità umana. Documenti della Santa Sede dal 1883 al 1983*, ed. by G. Tassello and L. Favero, Roma, Centro Studi Emigrazione, 1985; G.B. Scalabrini, *Lettere Pastorali 1876-1905*, unabridged edition edited by Ottaviano Sartori, Torino, Società Editrice Internazionale, 1994; G. Tassello (ed.), *Enchiridion della Chiesa per le Migrazioni. Documenti magisteri ali ed ecumenici sulla pastorale della mobilità umana (1887-2000)*, Bologna, Edizioni Dehoniane, 2001. See also: M. Sanfilippo (ed.), *Fonti ecclesiastiche per la storia dell'immigrazione e dei gruppi etnici in Nord America: Stati Uniti (1893-1922)*, «Studi Emigrazione», vol. 120, 1995; and G. Pizzorusso, M. Sanfilippo, *Fonti vaticane per la storia della presenza italiana in Canada e negli Stati Uniti, 1815-*

What perhaps remained in the background, and therefore needs to be further investigated and clarified historiographically, is the specific role that the Popes' teachings and the policies carried out by the Holy See had had in the field of emigration between the nineteenth and the twentieth century. Its understanding would allow us to shed new light on the fundamental choices and initiatives taken – in Italy and in the countries housing the emigrants – by the episcopate, the clergy in the care of souls and the religious institutions, as well as by the Catholic associations of patronage involved in the moral and material care of the «children of destitution and labor»⁵, which means those who left Italy in search of work and better living conditions.

In this respect, in a recent and important paper about the Church, religious orders and emigration, Matteo Sanfilippo has rightly called the attention to the real gap that still persists in studies and research on this side:

The action of bishops and religious congregations was studied. The collaboration between associations and Catholic clergy was analysed. The universe of the religious institution working with emigrants was investigated. It was finally remembered that the Catholic Church has provided sociability and cultural identity. The study of these aspects has developed analysis of the religious festivals and processions, of the parish associations linked to the cult of patron saints, of the network of schools and hospitals linked to parishes and missions, on the behavioral patterns conveyed and imposed by this dense network of places and moments of meeting. [...] In this abundant production, however, there is a serious lack: there aren't researches on the official role of the Holy See [...] in organizing the assistance and in mediating between the dioceses. We know a lot on the individual actions or on the participants, but we only have a broad outline on the official policy of the papacy⁶.

The aim of this paper is to explore the origins and main developments of the mastery practiced by the Holy See in relation to the Italian emigration abroad, with particular reference to the period between the mid-nineteenth and the second world war, or the phase in which over 18 millions of Italians left the peninsula to look for luck in other European countries or on the American continent (Argentina, Brazil, Canada, United States ecc.)⁷.

1922, in *L'emigrazione italiana 1870-1970. Atti dei colloqui di Roma 19-20 settembre 1989; 29-31 ottobre 1990; 28-30 ottobre 1991; 28-30 ottobre 1993*, Roma, Ministero per i beni e le attività culturali – Direzione generale per gli archivi, 2002, vol. II, pp. 1142-1153.

⁵ The quote is from a famous bishop of Piacenza Mgr. Giovanni Battista Scalabrini Giovanni: *L'emigrazione italiana in America: osservazioni di Mgr. Giovanni Battista Scalabrini vescovo di Piacenza*, Piacenza, Tipografia dell'Amico del Popolo, 1887, p. 50.

⁶ M. Sanfilippo, *Chiesa, ordini religiosi ed emigrazione*, in P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. I. Partenze*, Roma, Donzelli Editore, (2001) 2009², pp. 128-129.

⁷ See L. Favero, G. Tassello, *Cent'anni di emigrazione italiana (1876-1976)*, in G. Rosoli (ed.), *Un secolo di emigrazione italiana 1876-1976*, Roma, Centro Studi Emigrazione, 1978, pp. 11-37. But see also the more recent work by G. Rosoli, *Un quadro globale della diaspora italiana nelle Americhe*, «Altretalia. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. IV, n. 8, 1992, pp. 8-24.

1. *The Italian Church and the issue of emigration in the second half of the nineteenth century: a slow consciousness raising*

The first actions undertaken by the Church in favor of the moral and religious assistance of the Italians emigrated abroad are date back to the forties of the nineteenth century, well before that the migratory flows from the peninsula acquired the massive size and the growing trend of the last thirty years of the nineteenth century⁸. It is well-known, in this respect, the pioneering work started in London in 1844 by the Society of the Catholic Apostolate, the religious institute founded in 1839 by the Roman priest Vincenzo Pallotti with the building of St. Peter church, having the characteristics of the 'national parish', which was intended to answer the pastoral needs and religious practice of the vast Italian community living there⁹.

Equally noteworthy is the enterprise begun some decades later, in 1875, by don Giovanni Bosco with the sending in Argentina of some Salesian missionaries who, intended at the beginning to work for the conversion of the Patagonian natives, were then explicitly urged by Pius IX and the archbishop of Buenos Aires, msgr. Federico León Aneiros, to undertake also the pastoral care and the religious assistance of the over 30,000 Italians immigrated in the capital and in other places in the country¹⁰.

It may be added that, for what concerns Europe, since 1865, «the Barnabites in Paris, the Italian Lazzarists and, at the end of the nineteenth century, the Dehonianians in Marseille and elsewhere were soon active in favour of the Italian emigrants»; with reference to the United States, on the other hand, the beginning of the assistance to the Italian immigrants was given «by the initiative of St. Giovanni Nepomuceno Neumann, who founded in Philadelphia in 1854, the first Italian national church, S. Maria Maddalena de' Pazzi, later run by the Servites», while «individual religious men and priests were active in favour of the Italians in New York, New Jersey and Boston»¹¹.

In fact, at least until the second half of the 1980s, the actions promoted by the Italian Church on the side of pastoral care and the moral and material assistance of the emigrants were very limited and characterized, in the whole,

⁸ See Commissariato Generale dell'Emigrazione (ed.), *Annuario statistico dell'emigrazione italiana dal 1876 al 1925. Con notizie sull'emigrazione negli anni 1869-1875*, Roma, Edizione del Commissariato Generale dell'Emigrazione, 1926.

⁹ On this initiative, and, ore generally, on the work carried out by Pallotti among the Italian emigrants abroad see the references in F. Amoroso, *San Vincenzo Pallotti romano*, Roma, Postulazione Generale della Società dell'Apostolato Cattolico, 1962, pp. 379-389.

¹⁰ See, in this regard G. Rosoli, *Impegno missionario e assistenza religiosa agli emigranti nella visione e nell'opera di don Bosco e dei Salesiani*, in F. Traniello (ed.), *Don Bosco nella storia della cultura popolare*, Torino, SEI, 1987, pp. 289-329.

¹¹ Cfr. Rosoli, *Ordini e congregazioni religiose per l'emigrazione italiana*, in *L'emigrazione italiana 1870-1970. Atti dei colloqui di Roma 19-20 settembre 1989; 29-31 ottobre 1990; 28-30 ottobre 1991; 28-30 ottobre 1993*, cit., pp. 1351-1355.

by an episodic and marginal character. Indeed, in this regard, Emilio Franzina's opinion about the absence of «some significant actions capable of setting up a set of directives and specific guidelines that could escape the generic and contradictory dominance of the anti-immigration ideas» can be shared¹².

More specifically, we have to underline that «at the beginning, the sensitivity of the Italian Church towards this new massive phenomenon, was very scarce as a whole»¹³, as demonstrated not only by the absence of specific institutions and forms of coordination on this side, but also by the choices and tendencies of the episcopate and clergy regarding the problem. A glance at the pastoral letters published between the eighteenth and twentieth centuries by the bishops of the dioceses of Northern Italy, particularly affected by the phenomenon of mass emigration¹⁴, shows the scarce and, above all, very late attention given to the problem. It was, in fact, faced directly and specifically only at the beginning of the new century and was, in most cases, subjected to moralistic appraisals and unquestionably reductive approaches¹⁵.

Thus, in the pastoral letter of the bishop of Verona, msgr. Bartolomeo Bacilieri, published on the 8th December, 1900 with the title *Per la fine del secolo XIX*, the attention was called to the many dangers that such a cancerous plague caused to the integrity of the population's faith»¹⁶, while in that published a few years later, in 1906, by the bishop of Treviso, msgr. Andrea Giacinto Longhin did not hesitate to denounce the perverse nature of the negative consequences of what was called «the extraordinary phenomenon of emigration [...] which also grows among us», and under which, as the prelate underlined, «Adults, young people and children, even girls, either by necessity or by gaining pleasure, or by enjoying a freedom that they can not have under the watchful eyes of their parents, leave their home [...] and go to far-away countries, often Protestant or schismatic, to seek work. You will understand too late how many dangers they are exposed to [...] when they come back home, because they bring to the parish the blasphemy, the disgrace and the seeds of religious indifference, which is very close to unbelief»¹⁷.

¹² See E. Franzina, *La grande emigrazione. L'esodo dei rurali del Veneto durante il secolo XIX*, Venezia, Marsilio, 1975, p. 261.

¹³ Rosoli, *Ordini e congregazioni religiose per l'emigrazione italiana*, cit., p. 1353.

¹⁴ See Id., *Insieme oltre le frontiere. Momenti e figure dell'azione della Chiesa tra gli emigrati italiani nei secoli XIX e XX*, Caltanissetta-Roma, Salvatore Sciascia, 1996, pp. 119-125. See also: E. Franzina, *Dopo il '76. Una regione all'estero*, in S. Lanaro (ed.), *Storia d'Italia. Le regioni dall'Unità a oggi*, Torino, Einaudi, 1984, pp. 471-575.

¹⁵ See, in this regard, the documented reconstruction by S. Tramontin, *Il problema dell'emigrazione nella pastoralità dei vescovi veneti (dalla fine dell'Ottocento alla prima guerra mondiale)*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 269-297.

¹⁶ B. Bacilieri, *Per la fine del secolo XIX. Lettera pastorale di S. Ecc. Rev.ma Mons. Bartolomeo Bacilieri Vescovo di Verona*, Verona, G. Marchiori Tip. Vescovile, 1900, pp. 12-14.

¹⁷ Quoted in Tramontin, *Il problema dell'emigrazione nella pastoralità dei vescovi veneti (dalla fine dell'Ottocento alla prima guerra mondiale)*, cit., p. 281. The text of Msgr. Longhin's

As for the attitude expressed in the same period by priests and clergy in the care of souls¹⁸, the pastoral letter of the bishop of Vicenza msgr. Ferdinand Rodolfi was emblematic of a certain difficulty in maturing a wider and more perceived pastoral sensibility towards the believers who were forced to leave the diocese to emigrate abroad. In July 1914, he denounced how the mobilization of the diocesan pastoral structures in favour of the emigrants he had promoted, «unfortunately was a dead letter for some parishes»: «I'm really sorry – the priest of Vicenza concluded – because such a deplorable fact causes us to doubt that some priests do not want to understand that emigrants are their believers too, and that they should fulfill the very duties of their pastoral ministry also for them»¹⁹.

But the delays and uncertainties in understanding the mass dimensions of the migratory phenomenon and the range of its consequences on the religious and social level should also characterize the organizations of the intransigent Catholic movement framed in the *Opera dei Congressi* (*Work of the Congress*)²⁰. The problem of the Italian emigration abroad, in this regard, was widely debated during the first Catholic congresses held in Venice in 1874 and in Florence the following year, and then, after a long pause, in those celebrated during the nineties in Pavia (1894), Turin (1895), Fiesole (1896), Ferrara (1899) and Rome (1900), but without any concrete initiatives and achievements after the discussions, votes and envisaged commitments. As Francesco Malgeri rightly pointed out:

From the Congress of Pavia in 1894, the Work of the Congress began to deal with the issue of emigration. [...] However, it must be emphasized that these interventions at the various congresses can not be interpreted as organic proposals of the *Work of the Congress*. They were recommendations by the various speakers, welcomed by the congress but not

pastoral work is preserved in Archivio della Curia vescovile di Treviso, b. *Circolari del vescovo Longhin*, Circular of the 10th of March 1906.

¹⁸ See A. Lazzaretto Zanolo, *Parroci ed emigranti nel vicentino del primo Novecento*, in A. Cestaro (ed.), *Studi di storia sociale e religiosa. Scritti in onore di Gabriele De Rosa*, Napoli, Ferraro, 1980, pp. 1089-1118; A. Lazzarini, *Campagne venete ed emigrazione di massa (1866-1900)*, Vicenza, Istituto per le ricerche di storia sociale e religiosa, 1981; and E. Perbellini, *Parroci e società rurale nel primo Novecento*, in *Vita religiosa e sociale a Verona dal periodo austriaco all'età liberale. Le visite pastorali*, Verona, Centro Toniolo, 1983, pp. 109-118.

¹⁹ F. Rodolfi, *Sulle Emigrazioni. Lettera pastorale*, «Bollettino ecclesiastico della Diocesi di Vicenza», vol. V, 1914, pp. 193-196.

²⁰ On the *Opera dei Congressi* (Work of the Congress), 1874-1904, and on the experience of the intransigent Catholic movement in Italy of the last thirty years of the nineteenth century, see: G. De Rosa, *Storia politica dell'azione cattolica in Italia. 1. L'Opera dei Congressi, 1874-1904*, Bari, Laterza, 1953; A. Gambasin, *Il movimento sociale nell'Opera dei Congressi: 1874-1904. Contributo per la storia del cattolicesimo sociale in Italia*, Roma, Editrice Università Gregoriana, 1958; P. Scoppola, *Dal neoguelfismo alla Democrazia cristiana*, Roma, Studium, 1979; S. Tramontin, *L'intransigentismo cattolico e l'Opera dei Congressi*, in F. Malgeri (ed.), *Storia del movimento cattolico in Italia. I. I cattolici e lo stato liberale nell'Ottocento*, Roma, Il Poligono, 1980, pp. 3-229.

translated into real deliberations. So, even though the attitude of the Work seems more sensitive to the problem compared to what happened in the 1980s, the organization of the intransigent Catholicism can not be considered as an action aimed at pushing institutions towards more effective rules in favour of immigration. The cause of this incapacity has to be identified not only in the low attention and sensitivity towards the phenomenon but, above all, in the nineteenth-century culture of the Catholic intransigence, which prevented the members of the Work from being promoters of proposals, indications, suggestions to the Government, and the Parliament from collaborating with institutions in the implementation of more effective emigration legislation²¹.

The strong complaints formulated, starting from the second half of the eighties, by certain personalities of the episcopate particularly sensitive to the problem contributed to the developing in the Church and in the Italian Catholicism of a wider and profound awareness of the dramatic spiritual and material conditions of the Italian emigrants in the various European countries and the American continent. This is especially the case of the bishop of Cremona, msgr. Geremia Bonomelli²² and that of Piacenza msgr. Giovanni Battista Scalabrini²³. The latter, through the publication of some writings and the promotion of a series of speeches and conferences on the subject, was fundamental in raising the awareness of the Italian public opinion and of large areas of the Catholic world to what he defined «the great question of Italian emigration».

In a pamphlet entitled *L'emigrazione italiana in America. Osservazioni di Giovanni Battista Scalabrini, Vescovo di Piacenza*, given to the prints in 1887, he had presented a dramatic picture of the general abandonment in which Italian emigrants were:

I see those miserable people landed on foreign land, in the midst of a people who speak a language they do not understand, easy victims of inhumane speculation: they wet with their sweats and with their tears an ungodly furrow, a land exhaling pestilential miasmas, broken by the fatigue and the fever, they sigh in vain the heaven of far-away homeland and the old misery of the native farmhouse, and finally succumb without their dear ones' mourning to comfort them, without the word of faith can show them the prize God promised to

²¹ F. Malgeri, *La tutela legislativa dell'emigrante e l'apporto dei cattolici*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 262-263.

²² On the activity on this side carried out by Msgr. Geremia Bonomelli see: C. Bellò, *Geremia Bonomelli*, Brescia, Morcelliana, 1961; Id., *Scalabrini, Bonomelli e l'emigrazione italiana*, «Studi Emigrazione», vol. XII, 1975, pp. 3-46; and C. Marcora (ed.), *Carteggio Scalabrini Bonomelli (1868-1905)*, Roma, Studium, 1983.

²³ On the work carried out by Msgr. Giovanni Battista Scalabrini there is a rich bibliography. Here, we only mention the fundamental work by M. Francesconi, *L'apostolo degli emigranti. Giovanni Battista Scalabrini vescovo di Piacenza e degli emigranti*, Roma, Città Nuova, 1985; and the already mentioned collection of studies: Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit.

the good and the unfortunate people. And those who in the rough struggle for existence triumphed, here, dear me!, out there in the isolation, they forget every supernatural notion, every precept of Christian morality, and lose every day more the religious sentiment, not fueled by piety practices, and let the brutal instincts take the place of the highest aspirations.

And then:

Given such a tearful condition, I have often asked the question: how can you remedy it? And every time I read newspapers about some governmental circulars that warn the authorities and the public against the arts of some speculators, who make real raids of white slaves to push them, as blind instruments, away from their native land with the mirage of easy earnings; and when I notice from letters of friends or travel reports that the untouchable emigrants are the Italians, that they carried out the most unpleasant works, even if there can be cowardly in work, that the most abandoned, and therefore the least respected, are our compatriots, that thousands and thousands of our brothers live almost without defense of the motherland, subjected too often to unpunished bullies without the comfort of a friendly word, then, I confess, the flush of redness comes to my face, I feel humiliated both as a priest and as Italian.

Msgr. Scalabrini, far from being influenced by the anti-immigration instances characterizing large areas of the episcopate and the Italian clergy and that were probably the source of the little attention paid to the problem until that moment, considered the emigration by the poorest and more neglected parts of the population as a dramatic necessity caused by the conditions of misery and abandonment in which they were:

Emigration – the bishop of Piacenza wrote – is a natural, providential fact. It is a safety valve given by God to this troubled society. [...] Emigration in almost all cases is not a pleasure, but an inevitable necessity. Undoubtedly among the emigrants there are also bad, vagrant and vicious people, but these are the smallest number. The immense majority, not to say the totality of those who are expatriated, to go to the far America, are not of this kind; they do not flee from Italy for loathing of work, but for a lack of it and because they do not know how to live and support their own family²⁴.

Hence, the pressing demand for a strong commitment from the Church and Italian Catholics to the spiritual and material assistance of those who, forced by misery and despair, were compelled to leave Italy and seek their fortune abroad. In this regard, msgr. Scalabrini, in the speech about *L'emigrazione degli operai italiani* (*The emigration of the Italian Workers*) to the participants of the XVI Italian Catholic Congress of Ferrara of April 1899, thus expressed:

²⁴ *L'emigrazione italiana in America. Osservazioni di Giovanni Battista Scalabrini, Vescovo di Piacenza*, Piacenza, Tipografia dell'Amico del Popolo, 1887; published again in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, numero speciale di «Studi Emigrazione», vol. V, nn. 11-12, 1968, pp. 201-203.

Who could describe, gentlemen, the dangers that our poor emigrants are facing in relation to religious life? [...] They lose the feeling of nationality, and with it, the sentiment of Catholic Faith, and this is a shame, becoming victim of the Protestant propaganda, unhappy victims of the Sects, more and more active and numerous elsewhere. Ah! Gentlemen, let a Bishop cry for so much misfortune! The deprivation of that spiritual bread that is the word of God, the inability to reconcile with Him, the lack of worship and of all stimulation to goodness, deadly influence the people's morality. [...] Where every sensitive religious organization is absent, he gradually forgets his duties toward God, and the Christian life in his spirit weakens and dies.

According to the bishop of Piacenza, given such a dramatic situation, the simple denouncement of the absence and the serious defaults of the liberal state was not enough, but the whole ecclesial community had to be mobilized around an articulated and complex project capable of affecting the problem in its different sides and to remedy the serious problems that emigration had caused in the lives of individuals and communities:

But in healing the wounds that afflict the Italian emigration – msgr. Scalabrini concludes – the laws, gentlemen, are not enough, because some of these wounds are inborn in the very nature of emigration while others derive from remote causes that are out of the control of the laws, so that even the best laws of the world and its numerous perfect agents could not get rid of those evils. [...] It is here, gentlemen, that the work of the ruling classes must begin, here where the work of the law and government ends. And what is the right way? At first by studying and discussing the great problem of emigration, and then by considering the religious, economic, and civil well-being of many unfortunate brothers and sisters as an essential part of the action of the regional, diocesan and parish committees (and this is the prayer I address to the heads of the Catholic movement). In this sense, it is essential collecting material aids for their benefit, energetically discouraging emigration when it seems to be disastrous, defending it from ambushes and harsh contracts, and, in short, supporting it with all those religious and civil aids that can make it strong and almost invincible against the enemies, since the safety of each one in this case becomes everyone's safety²⁵.

In the light of what we have said until now, it is not a surprise the decision taken in February 1887 by msgr. Giovanni Battista Scalabrini to create a religious congregation, the Missionaries of San Carlo²⁶ (to whom, a few years later, in 1895, the Scalabrinian Missionary Sisters would be joined²⁷) «for the spiritual

²⁵ G.B. Scalabrini, *L'emigrazione degli operai italiani*, in *Opera dei Congressi e dei Comitati Cattolici in Italia, Atti e Documenti del XVI Congresso Cattolico Italiano tenutosi in Ferrara nei giorni 18-21 aprile 1899*, Venezia, Tip. Patriarcale già Cordella, 1899; now published again in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, cit., pp. 295-301.

²⁶ See G.B. Scalabrini, *Progetto di un'Associazione allo scopo di provvedere ai bisogni spirituali degli italiani emigrati nelle Americhe, Piacenza 16 febbraio 1887*, in AGS / BA 01-02-04 a,b,c.; now published in G. Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, Napoli, Autorinediti, 2014, pp. 195-201. See also P. Borzomati, *I Missionari di San Carlo dal 1887 alla morte di Scalabrini (1903)*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 335-334.

²⁷ See E. Martini, *Memorie sulla fondazione della Congregazione delle Suore Missionarie di*

assistance of the Italians emigrated to the Americas». Its primary purpose was that «to keep alive the Catholic faith in the hearts of our emigrated compatriots and to provide all we can for their moral, civil and economic prosperity»²⁸.

In 1889, in the wake of the similar association founded in Germany by Peter Paul (Simon) Cahensly in 1871 (*St. Raphaelsverein*), msgr. Scalabrini also constituted a secular charitable institution later named *Società San Raffaele*, whose purpose was to protect emigrants in the ports of departure and arrival (Genoa, New York, Boston ecc.) and during the transoceanic voyages, providing them with the necessary information and assistance²⁹.

In the same way, in May 1900, msgr. Geremia Bonomelli was among the promoters in Cremona of the *Opera di assistenza per gli italiani emigrati in Europa e nel Levante*, later called simply *Opera Bonomelli*³⁰, whose purpose was to provide material and religious assistance to the Italian emigrants in Europe and in the Levant: «For you – wrote msgr. Bonomelli to msgr. Scalabrini in April 1900 – the *Stable Emigrants* in America, for me the *Temporary Emigrants* in Europe, with different means»³¹. The partnership, directed until his death (1914) by the same bishop of Cremona and characterized by the collaboration of ecclesiastical and laic personnel³², succeeded within a few years in creating a wide network of missions and secretariats in France, Switzerland, Belgium and Germany and to give birth to numerous and important initiatives and charitable actions in favour of the Italian immigrants³³.

San Carlo Borromeo – Scalabriniane, in AGS, 103/8; *Brevi cenni sulla fondazione e sviluppo della Congregazione delle Suore Missionarie di S. Carlo anteriormente denominate Ancelle degli orfani e dei derelitti all'estero*, in AGS, 103/7. But see also the documented reconstruction by L.M. Signor, *Il progetto pastorale di Scalabrini e la fondazione delle Suore Missionarie Scalabriniane*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 349-370.

²⁸ G.B. Scalabrini, *Regolamento della Congregazione dei Missionari di San Carlo*, [19 September] 1888, in AGS/DE 22-04-07 b; now published in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., pp. 201-213 (quote on p. 201).

²⁹ See E.C. Stibili, *The Italian St. Raphael Society for the protection of Italian immigrants in the United States*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 469-480.

³⁰ See C. Bellò, *La fondazione dell'Opera di assistenza degli operai emigrati in Europa e nel Levante (1900)*, «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia», vol. IV, n. 1, 1966, pp. 5-25.

³¹ Msgr. Geremia Bonomelli to msgr. Giovanni Battista Scalabrini, Cremona 23 April 1900, in Marcora (ed.), *Carteggio Scalabrini Bonomelli (1868-1905)*, cit., p. 358.

³² See G. Prato, *L'emigrazione temporanea italiana e l'opera di assistenza di Mons. Bonomelli*, Torino, Roux e Viarengo, 1901; and G. Roberti, *Mons. Geremia Bonomelli e l'opera di assistenza degli operai italiani emigrati in Europa e nel Levante*, Bassano, Tipo-Litografia Antonio Roberti, 1905.

³³ See C. Bellò, *I segretariati dell'opera di assistenza per gli emigrati italiani in Europa: dal 1908 al 1913*, «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia», vol. VI, n. 1, 1971, pp. 33-52; and above all G. Rosoli, *L'Opera Bonomelli nei paesi europei*, in *L'emigrazione italiana 1870-1970. Atti dei colloqui di Roma 19-20 settembre 1989; 29-31 ottobre 1990; 28-30 ottobre 1991; 28-30 ottobre 1993*, cit., vol. I, pp. 439-457.

2. *Taking charge of the «unhappy and unfortunate [...] condition of those who emigrate every year from Italy to the regions of America». The strategies and work of the Holy See during the Leo XIII's pontificate (1878-1903)*

The concerned complaints and the constant insistences not only by Italian ecclesiastical personalities such as msgr. Bonomelli and msgr. Scalabrini, but also by the episcopates of the European countries and the American continent, become destination of the main migratory flows, aroused in the pontiffs and in the Roman curia a more acute awareness of the Italian emigrants' dramatic spiritual and material conditions and of the consequent need to prepare forms of consciousness-raising and intervention strategies to cope with this challenge.

In February 1887, in this regard, card. Giovanni Simeoni, prefect of the Holy Congregation of Propaganda Fide, answering a letter sent by msgr. Giovanni Battista Scalabrini, in which the bishop of Piacenza denounced the condition of the true spiritual and religious abandonment of thousands and thousands of Italians migrated to America³⁴, showed to be fully aware of the gravity of the problem and proposed some interesting indications on the limits of the interventions that had been undertaken up to that point:

I was very pleased – the card. Simeoni wrote – of the letter of Your Lordship in which he talks about Italian emigrants in America. I am also deeply sorry of the sad conditions in which they are. The reports given to this S[acred] C[ongregation] by the Archbishops of New York City and New Orleans, and by the Fathers of the Third Baltimore Plenary Council give a very discouraging idea of their spiritual and religious condition. It is not necessary here that I briefly expose to you this bad information, because you know enough about it. I just want to underline that this S[acred] C[ongregation] did not fail to make attempts to establish committees of support in favour of the Italian emigrants: but too much efforts have not given satisfactory results so far. [...] At present, Msgr. Ireland, Bishop of St. Paul in the United States of America, is in Rome and has proved to be willing to contribute with his work in order to establish a Committee that takes care of the religious and temporal interests of the Italian emigrants. When his letter arrived, we have been already thinking of implementing this project. I was relieved to report this to the Holy Father, who liked his initiative and his proposal³⁵.

³⁴ This is the letter by mgr. Giovanni Battista Scalabrini to card. Giovanni Simeoni, Piacenza 16 February 1887, in AGS / BA 01-02-04 a,b,c.; now published in *Inizi della Congregazione Scalabriniana (1886-1888)*, ed. by M. Francesconi, Roma, Centro Studi Emigrazione, 1969, pp. 23-24. The *Progetto di un'Associazione allo scopo di provvedere ai bisogni spirituali degli italiani emigrati nelle Americhe* (*ibid.*, pp. 25-31), was attached to this letter and prepared by the bishop of Piacenza.

³⁵ Card. Simeoni's letter is partially reproduced in the already mentioned pamphlet *L'emigrazione italiana in America. Osservazioni di Giovanni Battista Scalabrini, Vescovo di Piacenza*, in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, cit., p. 227. The project supported by msgr. Ireland, mentioned by card. Simeoni in the letter, was described in J. Ireland, *Projet d'une Oeuvre en faveur des Emigrants Italiens spécialement aux Etats Unis*, Rome 10 mars 1887, in AGS / BA 01-02-01 c.

The 'suggestion' mentioned in the letter was the one formulated by msgr. Giovanni Battista Scalabrini in the already mentioned *Progetto di un'Associazione allo scopo di provvedere ai bisogni spirituali degli italiani emigrati nelle Americhe*, which would be accepted with some modifications and clarifications by Leo XIII. He was, in fact, convinced of the substantial goodness of the design pursued by the bishop of Piacenza³⁶, but, at the same time, he was worried about the hypothesis of a collaboration with the laic associations involved in the migrants' assistance, first of all the National Association for the Assistance of Italian Missionaries (ANSMI), the association Directed by prof. Ernesto Schiaparelli³⁷, judged by the Holy See too liberal and «too independent from the clergy», with whom it was not possible therefore to establish any kind of connection³⁸.

In the immediate following months msgr. Scalabrini, abandoned the hypothesis of a collaboration with the Associazione Nazionale per il Soccorso dei Missionari Italiani (ANSMI), returned to solicit the Holy See for the final approval of his project³⁹. On November 7, he met in Rome with the secretary of the Holy Congregation of Propaganda Fide msgr. Jacobini, with whom he prepared a new version of the project to be submitted to Leo XIII's approval:

1. – It would be appropriate – we can read in the new version of the document – to establish in Italy an Institute of Priests, under a regulation to be approved by the Propaganda, willing

³⁶ «The Holy Father – we read in the reminder of the hearing given by the Pontiff Leo XIII to the secretary of the Holy Congregation of the Propaganda Fide, msgr. Domenico Jacobini on June 26, 1887 – ordered Bishop Scalabrini of Piacenza to visit America for some time in order to provide under his leadership assistance to Italian emigrants by means of priests to be sent by those Italian bishops that could provide; However, the Bishops of the two Americas should be informed that the Holy See was moved by the necessity to provide for the emigrants' needs; that It intends to give the Bishop of Piacenza full powers, but not in an absolute way; It wants to know the limitations suggested by the Bishops to keep them under consideration» (*Promemoria «Ex audientia SS.mi»*, Roma 26 June 1887, in AGS / BA 01-02-01c; reproduced in *Inizi della Congregazione Scalabriniana (1886-1888)*, cit., pp. 37-38).

³⁷ See O. Confessore, *Origini e motivazioni dell'Associazione nazionale per soccorrere i missionari cattolici italiani: una interpretazione della politica estera dei conciliatoristi nel quadro dell'espansionismo crispino*, «Bollettino dell'Archivio per la Storia del Movimento Sociale Cattolico in Italia», vol. XI, n. 2, 1976, pp. 239-267; Ead., *L'Associazione nazionale per soccorrere i missionari cattolici italiani, tra spinte «civilizzatrici» e interesse migratorio (1887-1908)*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 519-536.

³⁸ In this sense, see the letter sent by the secretary of the Holy Congregation of the Propaganda Fide msgr. Domenico Jacobini to msgr. Scalabrini on the 6th of July 1887, in which, also on behalf of the prefect of the pontifical dicastery, card. Simeoni, it was said: «It is important not to mix in any way this negotiation with the National Committee for Assistance to the Italian missions [*sic!*] which has not been approved by Propaganda and does not enjoy its favor» (in AGS / BA 01-03-10b; reproduced in *Inizi della Congregazione Scalabriniana (1886-1888)*, cit., pp. 41-42).

³⁹ See in this sense the precise reconstruction by Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., pp. 72-79, which we have particularly kept in mind in this paragraph of our work.

to go to the emigrants in America and to remain to assist them at least for five years. They should declare their willingness to the bishops and they would receive the necessary powers from them. The Bishop of Piacenza has the means to provide for the house of the Institute, the rest should be received from oblations. 2. – It would be appropriate to suspend the determination to send a Bishop to America in order to know the conditions of the emigrants and their needs, since they are largely known, for what concerns the United States and Brazil, and it would be easy to know by the correspondence with bishops the need of those in other states of America. So we would propose the idea of a circular letter to the bishops of the various regions, asking them for the missing information, stating that the Holy Father wishes to remedy as far as possible to the evils of emigration and so invites the Italian bishops to send some pious and zealous priests to assist them. In order to prepare them for this difficult mission, a house was built in the Diocese of Piacenza, and they can go there to express to the bishops their willingness to help; and then the bishops in need of Priests could turn to the Propaganda, which would ask to the above-mentioned Institute. 3. – For what concerns the Bishops of Brazil they should directly confer the powers to these Missionaries without making them dependent on the parish priests and the indigenous vicars and separating, if necessary, the territory of the Italians from the rest of the parish. [...] Write a letter to the Bishop of Piacenza in which commending the new institute, adding that His Holiness wishes that the Italian Bishops allow the priests with a particular vocation to devote themselves to those missions and to enter in the above mentioned Institute. 4. – Establish in America some central home for these Missionaries to carry out missions among too far emigrants who cannot find a fixed priest⁴⁰.

The pontiff, at the hearing given to msgr. Scalabrini on 13th November, was fully satisfied with the new and definitive version of the project, to the point that, writing to mgr. Jeremiah Bonomelli immediately after the conversation with Leo XIII, the bishop of Piacenza, generally very cautious in his assessments, expressed a cautious optimism about the final outcome of the affair: «If the devil does not have a hand in this – he wrote –, it seems that's fine. Thanks to the Lord for this»⁴¹.

On November 15, msgr. Jacobini notified to the bishop of Piacenza the approval by the Pontiff «of the Institute of priests in Piacenza proposed by him»⁴². Ten days later, on November 25, 1887, in accepting one of the requests made in the project, Leo XIII sent to msgr. Scalabrini the short *Libenter agnovimus*, in which, on the one hand, he expressed his approval of the bishop of Piacenza's choice to give birth in his diocese to a house of priests destined to take care of the religious assistance of the Italian emigrants in America, on the

⁴⁰ *Pensieri proposti al S. Padre per rimediare ai disordini dell'emigrazione italiana. Promemoria*, Roma 9 November 1887, in AGS / BA 01-04-06; reproduced in *Inizi della Congregazione Scalabriniana (1886-1888)*, cit., pp. 53-55.

⁴¹ Letter of msgr. Giovanni Battista Scalabrini to msgr. Geremia Bonomelli, Roma 13 November 1887, in Marcora (ed.), *Carteggio Scalabrini Bonomelli (1868-1905)*, cit., pp. 226-227.

⁴² See the text written in Latin and dated Rome 15 November 1887, attached to the letter of Mgr. Domenico Jacobini to Msgr. Giovanni Battista Scalabrini, Rome, November 16, 1887, in AGS / BA 01-04-07; reproduced in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., p. 77.

other, he strongly emphasized the central importance for the Apostolic See of the commitment to take on the «spiritual needs» of the emigrants:

We also welcome the news – the pontiff wrote – that you have taken the noble decision to give birth in your Bishop's Place to an institute of ecclesiastics who show the determined intention to move to far-off territories, especially America, to bring the support of the sacred ministry to the multitude of Italian Catholics who, driven by the need to emigrate from their homeland, have settled in those regions. We, by the Apostolic Office, have the salvation of souls particularly close to our hearts and consequently we feel the duty to promote what is needed to give an answer to the spiritual needs of the believers, Venerable Brother, that your Noble decision is of utmost utility. So we appreciate the ardent charity of those who, for the sake of Christ, want to consecrate themselves to this holy work. We are confident that the Italian Bishops, for the deep attachment to the religion that distinguishes them, will favour the initiative and, if some priests of their dioceses wish to devote themselves to this ministry, will give their assent to their generous choice and, if possible, they will fully support them⁴³.

On November 25, 1887, the Holy Congregation of Propaganda Fide, in accepting another of the requests formulated in the project sent to the Pontiff by msgr. Scalabrini, let know to the Italian US and Brazilian bishops, and to the nuncios, internuncios and apostolic delegates operating in the New World the constitution in Piacenza of the home for the missionaries of the emigrants⁴⁴.

Given this position of the Holy See, however, the lack of collaboration of the Italian episcopate and, in particular, the real resistance encountered in an extremely significant part of the Latin American ones were intended to arouse growing concern in msgr. Scalabrini. At the beginning of December 1888, in this regard, the bishop of Piacenza manifested to the card. Simeoni his discouragement for the growing difficulties many Italian bishops had to face at the request of their priests to engage in the pastoral care of Italian emigrants in America:

The candidates – msgr. Scalabrini wrote – would not miss it, but not all Bishops are up to their mission, forgetting the many hundreds of thousands of souls that perish, and opposing to some priests' help. What is for a Diocese, like ours, a priest in more or less! Oh Eminent, what meanness even with our Lord⁴⁵.

⁴³ Leo PP. XIII, *Litterae ad Episcopum Placentinum [I.B. Scalabrini] de Instituto sacrorum virorum qui in Americam proficiscentes, opem s. ministerii ferant Italis illuc rerum necessitate compulsis*, Romae XXV Novembris MDCCCLXXXVII, «Actae Sanctae Sedis», XX, 1887, p. 305. The Italian translation of the document partially reproduced in the text is the one published in G. Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., p. 79.

⁴⁴ See the text of the newsletter, dated Rome 25 November 1887, in Archivio Storico di Propaganda Fide (hereafter: ASPF), at the Congregazione per l'Evangelizzazione dei Popoli (Città del Vaticano), Collegi d'Italia, Piacenza, f. 1390.

⁴⁵ Letter of msgr. Giovanni Battista Scalabrini to the card. Giovanni Simeoni, Piacenza 7 December 1888, in AGS / BA 01-17-06; reproduced in *Inizi della Congregazione Scalabriniana (1886-1888)*, cit., p. 137.

A few months earlier, in September 1888, the bishop of Piacenza had reported to the prefect of the Holy Congregation of Propaganda Fide the difficulties encountered in Brazil by the first missionaries of the institute⁴⁶ sent to that country to provide religious assistance to Italian emigrants:

Those [missionaries] shipped to New York – msgr. Scalabrini wrote – have already managed to open a Church there, modest, but independent and much attended. That Excellent Archbishop writes me enthusiastically about the work. [...] Here are the news of the other Missionaries I have sent to Brazil arrived yesterday. Those landed at Curitiba were welcomed by those colonizers with demonstrations of lively joy. They immediately went to work. [...] I can not say anything yet of the three landed in Rio de Janeiro. For the Providence Of the Holy Spirit, because they have not yet arrived to their fate. I know that the meeting with the Bishop of Rio was not too gratifying and encouraging. He welcomed them saying that their mission was very difficult, that nothing would have been achieved, that he, for his part, would have gladly sent all the Italians away, because he did not want to disappoint the Vicars, and other similar compliments. However, he granted to the Missionaries the faculty of celebrating, preaching, confessing, administering the Viaticum and the Extreme Unction throughout the year 1889. As for Weddings and Baptisms *ad nutum parochorum*.

Hence the pressing request formulated by msgr. Scalabrini to card. Simeoni of a direct intervention by the pontiff about the American episcopate to protect the immigrants' mission:

Two things in my opinion – the bishop of Piacenza wrote – are indispensable: 1 that the Holy Father publishes the letter to the Bishops of America [...]; 2 which, in accordance with the principle established by the Congregation of Propaganda, a letter to the Bishops of Brazil was sent, ordering them to separate from the parish jurisdiction the territories inhabited by the Italian settlers, so that the ours can be free in the exercise of their sacred ministry⁴⁷.

In such a context the apostolic letter *Quam aerumnosa* was published, on December 10, 1888, addressed by Leo XIII to the bishops of the American continent. With this letter, the Holy See manifested for the first time in a direct and incontrovertible manner the will to take on the management and coordination of the initiatives for the religious assistance to emigrants. The text of the papal document – which was inspired, even if only partly, by mgr. Scalabrini's suggestions and proposals – opened with a lucid and passionate illustration of the serious material and spiritual conditions of migrant populations:

Venerable Brothers, Health and Apostolic Blessing. How unhappy and unfortunate is the condition of those who emigrate every year from Italy to the regions of America to seek means of subsistence, it is so well known to you that it is not the case to insist on our part. Indeed, you see closely the evils oppressing them, which have been reported from many of

⁴⁶ See *Inizi della Congregazione Scalabriniana (1886-1888)*, cit., pp. 123-135.

⁴⁷ Letter of mgr. Giovanni Battista Scalabrini to card. Giovanni Simeoni, Piacenza 8 September 1888, in AGS / BA 01-14-04; reproduced in *ibid.*, pp. 129-130.

you in the frequent letters sent to us. It is regrettable that so many miserable Italian citizens, forced by poverty to change their homeland, often succumb to more severe anguish than those they wanted to escape. And often the fatigue of various kinds in which the body's life is worn, the ruin of souls is added, much more ferocious. The very first emigrants' journey is full of dangers and sufferings; many in fact meet greedy men, become almost their slaves, and are kept as a herd in ships and treated inhumanly, are slowly pushed to the degradation of their very nature. When they land in the harbors, ignorant of the language and the environment, they are soon appointed to daily work and are exposed to the speculators and the powerful men's vexations. Those who, with their own spirit of initiative, succeeded in obtaining enough for their own sustenance, living among those who think only of their own need and advantage, gradually abandon the noble senses of human nature and learn to lead the very life of those who have directed all hope and all plans to the earth. And often to the fatigues of various kinds of the body, the ruin of the souls is added, much more ferocious. Hence often the stimuli of greediness come, and the deceits of the sects, which attack the defenseless religiosity and drag many on the path leading to perdition. Of all these evils, the most mournful is that in the midst of such a large crowd of men, in so many territories and in difficult environmental conditions, it is not easy for immigrants to be close to the assistance of the ministers of God, who, knowing the Italian language, can convey them the word of life, administer the sacraments, provide the appropriate relief from which their soul is elevated to the hope of celestial goods and their spiritual life is sustained and fortified. Therefore, in so many places those who, at the point of death, are assisted by a priest are very rare; infants without a priest to infuse the regenerating washing are not uncommon; many of them contract marriage without taking any account of the laws of the Church, so that the offspring grow like their father, and so in such social groups Christian customs are obliterated and bad behavior develops.

Leo XIII stated that the increased awareness of the situation of spiritual abandonment and of great moral discomfort that characterized «such a great multitude of men», had urged the Apostolic See to take care of the safeguard of the «innumerable souls devoid of all Comfort of Catholic religion». However, this urgent and indispensable pastoral work required the widest and most intensive collaboration («There is the hope that we will never miss your commitment and your cooperation»), hence the need for a full involvement of the Episcopates of the immigrant host countries:

Reflecting on all these aspects and deploring the miserable fate of so many men, who, as a herd without a shepherd, we see erroneously wander in steep and hostile places, and recalling the eternal Shepherd's charity and his dictates, we felt our duty to give them all the possible help. [...] Since the main cause of the growing evils lies in the fact that those unfortunates lack the priestly assistance that administers and increases the celestial grace, we decided to send numerous priests from Italy, who can comfort their compatriots with a known language, teach the doctrine of the faith and the ignored or forgotten precepts of Christian life, practice the good ministry of the sacraments, educate their children to grow in the religion and feelings of humanity, and finally to be of aid to everyone, with the Word and the action, assist all according to the duties of the priestly mission. And, in order to do this more easily, with our letter under the Fisherman's Ring of 15 November last year, we set up the Apostolic College of Priests at the Bishop's Headquarters in Piacenza, under the direction of the venerable Brother Giovanni Battista Bishop of Piacenza, where the ecclesiastics animated by the love of Christ may come from Italy to cultivate those

studies, carry out those functions and discipline permitting them to go on a mission in the name of Christ to the far away Italian citizens, and become effective dispensers of divine mysteries. Among the disciples of that College we wanted to be as a seminary of ministers of God for the health of the Italians living in America, we wanted to welcome and educate also young people from your countries, born of Italian parents, [...] so that, then, fortified by the priesthood and returned under your pastoral authority can carry out those necessary functions of the apostolic ministry. We do not doubt that when they return they will be received by you with charity and will be given the appropriate powers to carry out the sacred ministry for their fellow citizens after having warned the pastor. In fact, they will come to you as auxiliary troops, so that, under the authority of each of you, and under your dioceses they will devote themselves to the sacred militia. [...] Therefore, we consider a good initiative if dioceses with more immigrants from Italy will become convents of priests who, when go through the surrounding regions and cultivate them with sacred expeditions. It will then up to your wisdom to distinguish how and in which places they can more appropriately establish their homes. [...] From this initiative we have undertaken for the care and safeguard of the innumerable souls without any comfort of the Catholic religion, we expect copious fruits⁴⁸.

Indeed, in the Apostolic Letter *Quam aerumnosa*, the cautiousness and concern of the Holy See to safeguard the role and prerogatives of the American bishops and not to hurt the sensitivity of local churches, were to prevail over the will to remove definitively, with a decisive intervention imposed by the center, the obstacles faced by particular jurisdictions, especially in Brazil, in the religious assistance of Italian emigrants⁴⁹.

In this respect, it would be sufficient to point out that the proposal suggested by msgr. Scalabrini to address «to the bishops of Brazil, ordering them to separate from the parish jurisdiction the territories inhabited by Italian colonists, so that ours are free in the carry out their sacred ministry», in the papal document issued on 10th December 1888, had been recognized only partially. In other words, it was transformed into a generic exhortation to allow «young people from your countries born of Italian parents» once «fortified by the priesthood and returned to it» to carry out «the functions of the Apostolic ministry» among the communities of Italian immigrants⁵⁰.

The Apostolic Letter *Quam aerumnosa* was, however, destined to mark the beginning of a growing season of Leo's pontificate, on the side of pastoral

⁴⁸ Leo PP. XIII, *Epistola Venerabilibus Fratribus Archiepiscopis set Episcopis Americae*, Romae X Decembris MDCCCLXXXVIII, «Actae Sanctae Sedis», vol. XXI, 1888, pp. 258-260. The Italian translation of the sdocument, partially reproduced in the text, is the one published in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., pp. 213-216.

⁴⁹ On the «poor echo» aroused in the episcopate and Latin American clergy by the Apostolic Letter *Quam aerumnosa* by Leo XIII see the recent contribution by M. Sanfilippo, *La Chiesa cattolica*, in P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. II. Arrivi*, Roma, Donzelli Editore, 2009², p. 484.

⁵⁰ The Bishop of Piacenza's proposals are contained in the already mentioned letter by msgr. Giovanni Battista Scalabrini to card. Giovanni Simeoni, Piacenza 8 September 1888, cit.

care and the religious assistance of Italian emigration abroad. In this phase, for example, Leo XIII established four new apostolic delegations, including that of the United States (1893), and the building of 65 apostolic vicariates, 35 apostolic prefectures, 34 Archdioceses and 79 dioceses in mission areas and territories where the presence of immigrants was more common⁵¹.

More generally, different measures on religious assistance to immigrants were issued by the Holy See in this period⁵². Amongst them, the circular letter sent by Leo XIII's State Secretary, card. Mariano Rampolla del Tindaro, to the Italian bishops is worthy of note, for the relevance of the provisions contained in them and the wide echo generated in Italy and abroad, on the dramatic moral and spiritual conditions of the Italian temporary emigrants in the main countries of Europe:

It's well known – the card. Rampolla wrote – that the temporary migration of the Italian workers across Europe and mainly to Switzerland, France, Austria and Germany, has grown in recent years. I am unfortunately also aware of the dangers of all sorts they are exposed to, far from the family and the native parishes; dispersed in a foreign country; confused among other workers, indifferent, skeptical, unbelievers and corrupt. Without a sacred place to gather them, without sacraments and priests, and without a friendly word, exposed to the dangers and seduced by a cautious and active Protestant and socialist propaganda, they soon forget that little religious education they may have received, abandon the devout practices and end up in a desolating indifference, with the total loss of faith and morality. So, when they return home, they often show irreligion and unbelief, and, what is worse, they become propagators of blasphemous and subversive principles.

Given such a dramatic state of things, card. Rampolla remembered that, following Leo XIII's impulse, some bishops and ecclesiastics of Northern Italy had mobilized to give rise to initiatives of religious and moral assistance to Italian emigrants:

This very sad situation did not escape the Holy Father vigilant attention; Who, on several occasions, recalled on it the attention of some of the Bishops of Upper Italy, where the temporary emigration used to be greater; and after hinting at the serious risks that Italian emigrants are exposed to, especially in Switzerland, he urged them to take care of them seriously, pointing out the appropriate means to this end. [...] Such affectionate attentions

⁵¹ See G.P. Fogarty, *The Vatican and the American Hierarchy from 1870 to 1965*, Stuttgart, Hiersemann, 1982; S. Di Giovanni, *The Apostolic Delegate in the United States and Immigration, 1892-1896*, «U.S. Catholic Historian», vol. 12 1994, pp. 47-68; W. Henkel, *La Chiesa in America Latina*, in J. Metzler (ed.), *Storia della Chiesa. Vol. XXIV. Dalle missioni alle chiese locali (1846-1965)*, Milano, Paoline, 1990; M. Sanfilippo, *L'affermazione del cattolicesimo nel Nord America. Élite, emigranti e Chiesa cattolica negli Stati Uniti e in Canada, 1750-1920*, Viterbo, Settecittà, 2003.

⁵² As an example, we remember: Sacra Congregazione de Propaganda Fide, *Litterae Delegati apostolici Statuum Foederatorum quoad dubia parochialitatis apud quasi paroecias erectas pro populo diversae linguae*, Romae 26 Aprilis 1897, «Actae Sanctae Sedis», XXX, 1897-1898, p. 256; Sacra Congregazione de Propaganda Fide, *Litterae circulares ad Italiae Ordinarios ne promoveant ad sacros Ordines externos Clericos, absque litteris testimonialibus*, Romae 2 Maii 1898, «Actae Sanctae Sedis», vol. XXXI, 1898-1899, p. 320.

by His Holiness were not certainly without effect. Many bishops, who obeyed the Holy Father's wishes, rushed to send overseas, and particularly to Switzerland, some zealous priests, with the task of assisting the numerous Italian emigrants spiritually, morally and materially. Some Italian and foreign ecclesiastics, for their spontaneous desire and private initiative, with a commendable zeal, devoted themselves to this same saint task, someone permanently while others periodically for a few months of the year, i.e. during the time of work and presence of the Italians abroad, They moved to the centers of emigration to administer to the workers gathered there the word of God and the Holy Sacraments. Someone also found, among the same Italian workers, Catholic societies and institutions, with the aim to open chapels and schools, to provide for their economic improvement and to prevent mixed marriages. There was also the establishment in Upper- Italy of some Committees of generous and charitable people with the aim to provide the necessary means to support the work of emigrants' assistance and to give it a stable form and a greater development. Recently, consortia of parishioners have been also set up, with the aim of bringing aid to their parishioners emigrated to Switzerland; both by ensuring that before their departure they receive the Holy Sacraments, and by distributing their religious objects, newspapers, pious books, leaflets of amenable reading; and by ensuring that they do not remain isolated once out of Italy, but they are united in group.

And yet, without denying the opportunity and importance of these benevolent initiatives, the constant worsening of the living conditions of Italian emigrants in Europe required further and even more intense efforts on the part of the Church:

But growing every day more the grave dangers of the poor Italian emigrants, His Holiness – to whom nothing matters more than the health of souls and the moral and material well-being of many of his sons, particularly dear to him – really wants that, in proportion to these dangers, the means of preservation, assistance and protection also be multiplied. It is, then, that the Supreme Pontiff, while being highly pleased with the good work carried out for the emigrants, has nevertheless understood the urgent need for new and ready measures to make the good wills more effective [...] and to obtain other co-operations⁵³.

The insistences by the Secretary of State, card. Rampolla, to the Italian episcopate to consider the peculiar necessity of the continental emigration directed towards the industrial zones of central-northern Europe, considered a “temporary” phenomenon with respect to the “permanent” emigration to the American continent, were destined to have significant attention and mature a wider sensitivity with regard to the drama of emigration in the Italian ecclesiastical environments⁵⁴.

A few weeks earlier, in May 1900, as we have already said, Mgr. Geremia Bonomelli had established in Cremona the *Opera di assistenza per gli italiani*

⁵³ Secretaria Status [M. Card. Rampolla], *Litterae circulares ad Archiepiscopos Italiae, ut emigrantium spiritualibus necessitatibus consulatur*, Romae 19 Giugno 1900, «Actae Sanctae Sedis», vol. XXXIII, 1900-1901, pp. 215-217.

⁵⁴ See S.M. Di Giovanni, *The Propaganda Fide and the «italian problem»*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 443-452.

emigrati in Europa e nel Levante, later called *Opera Bonomelli*, whose aim was to promote organic initiatives and works for the material and religious assistance of the Italian emigrants in Europe and in the Levant, and that fully respected the instances formulated by the Holy See⁵⁵.

Nevertheless, an evaluation of the ambitious initiative launched by the Holy See in the years of Leo XIII's pontificate on the side of the religious assistance to Italian emigrants can not ignore the lack of an effective co-ordination and the little systematic nature of a large part of the initiatives carried out in this period, as well as, on the other side, the oppositions and resistances of the episcopate and the clergy of the hosting countries⁵⁶.

The case of Brazil, in this regard, is emblematic, but far from being isolated. Here the oppositions by certain bishops and by a part of the local clergy to the dispositions of the Holy See in the matter of the moral and religious assistance of Italian immigrants, that were still present in the early twentieth century, had to be added to the criticalities and dysfunctions created by the patronage regime that characterized the Brazilian ecclesiastical structure and influenced greatly the customs and the work of clergy in the care of souls and the same pastoral practice⁵⁷.

Even in the first decades of the twentieth century, the correspondence between the apostolic nuncio in Brazil and the State Secretary, documented the decisive hostility of many bishops and a large part of the indigenous clergy towards the Italian priests and the religious and pastoral care of immigrants administered in Italian language:

The Italian colony of S. Paulo, with more than 200,000 souls – Gianfausto Rosoli emphasized in this regard – had only one Italian parish and no other could be established because of the Archbishop Mons. Duarte Leopoldo Silva's opposition. The nuncio [...] did not understand the reasons for the preconceived hostility towards the Italians, who found great consensus in the Brazilian curia and clergy. [...] There was another unsustainable pastoral decision: the Archbishop forbade the children's education and the confession in Italian. Three new parishes were being created in the densely populated Italian district of Braz. The bishop had clearly said that the parish priests were to be Brazili. He did not appreciate Italian religious men, unless they were in a subordinate position, as assistant priests⁵⁸.

⁵⁵ See Bellò, *La fondazione dell'Opera di assistenza degli operai emigrati in Europa e nel Levante* (1900), cit., pp. 5-25. On the vicissitudes of the *Opera Bonomelli* in the Twenties that caused its suppression by the Fascist regime see in particular: Ph.V. Cannistraro, G. Rosoli, *Emigrazione, Chiesa e fascismo: lo scioglimento dell'Opera Bonomelli 1922-1928*, Roma, Studium, 1979.

⁵⁶ Useful ideas in N.T. Auza, *La Iglesia y la evangelización de la inmigración*, «Estudios Migratorios Latinoamericanos», vol. 14, 1990, pp. 104-137; and, above all, in N.T. Auza, L.V. Favero, *Iglesia e inmigración*, Buenos Aires, CEMLA, 1991.

⁵⁷ See C.A. Zagonel, *Igreja e imigração italiana*, Porto Alegre, EST/Sulina, 1975; R. Azzi, *A Igreja e os Migrantes. I: A migração italiana e os primórdios da obra escalabriniana no Brasil (1884-1904)*, São Paulo, Edições Paulinas, 1987.

⁵⁸ G. Rosoli, *Chiesa ed emigrati italiani in Brasile: 1880-1940*, in *Chiesa ed emigrazione italiana tra '800 e '900*, «Studi Emigrazione», vol. XIX, n. 66, 1982, pp. 230-231.

The problem, however, had deep roots and concerned not only Brazil but, for different and unreliable reasons, the entire Latin American ecclesiastical reality:

The [Latin American] Church – Luigi Favero rightly recalled – comes out of the colonial period and civil wars with a difficult and conflicting connection with Rome (which had not supported independence from Spain) and with an organizational structure still embryonic: few Dioceses (12 in Brazil and 5 in Argentina) with vast territories, often without bishops or with very old bishops and with a huge shortage of clergy. The patronage regime had transformed the clergy into state officials, who, moreover, watched and intervened in the construction of churches, monasteries and seminars and in the management of ecclesiastical benefits. The parish priests were collecting taxes for the administration of the sacraments, especially baptism and marriage, which effectively prevented many poor people from have access to them. The scarcity and the bureaucratic role of the clergy left, in fact, the religiosity of the people to develop almost independently on the roots of the first Christian education given by the missionaries through the repetition of the formulas of faith and elementary catechesis, often condensed in songs and prayers that represented the only doctrinal content but with a flourishing of devotions, pilgrimages and celebrations that animated and characterized both the stages of individual and communal life and working activities.

Given such a picture, it is not surprising the attitude of closure and hostility manifested by substantial areas of the Latin American churches, regarding the work of spiritual and material assistance provided by Italian priests and religious men to the Italian emigration:

It is illuminating, in this respect, – Luigi Favero recalls – n. 768 of Chapter II of the Official Decrees of the First Latin American Plenary Council, hold in Rome by Leo XIII in 1899, to apply the Vatican I and continue the evangelization and reorganization of churches in South America. While in the preparatory scheme, the believers and the clergy are urged to receive, with Christian charity, the immigrants, defending them from the dangers and risks, to form committees to help them materially and morally, to place priests who speak Italian and French in the main cities and in the ports, nothing of this remains in the final relation, which instead emphasizes the dangers for the faith⁵⁹.

Finally, as Matteo Sanfilippo pointed out with reference to the late 19th century migratory processes and the role played by churches in the American continent and in the old Europe:

The traditional suspicion towards the Italians s more and more evident and some US bishops demand the total and rapid assimilation of those immigrants. As a result, Propaganda Fide's invitations to call priests from Italy and to be concerned about the immigrant's faith, rather than for his Americanization, went unheeded [...] In the case of South America, various

⁵⁹ L. Favero, *Gli Scalabriniani e gli emigrati italiani nel Sud America*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 395-397.

elements come together to make the relationship between Italian parishes and local dioceses difficult. [...] In most European countries the economic situation is not better. In France and Belgium, bishops worry little about immigrants, much more than the little beloved Italians⁶⁰.

These difficulties and resistances, which were to be added to the indifference and the low involvement of a substantial part of the Italian episcopate regarding the problem of mass emigration, would have pushed Leo XIII's successor, Pontiff Pio X, to focus on the increasing centralization of the functions and competences in this field and on the creation of a plurality of organisms and practical initiatives for the spiritual and material assistance of the emigrants in the various countries.

3. *Pius X's Church (1903-1914) and the centralizing and organizational push in favor of the Italian emigration's assistance abroad*

During Pius X's pontificate, the question of the Italian emigration overseas takes on a role of primary importance for the Holy See and is at the center of the concerns and initiatives of the new pope⁶¹. Pope Sarto, born in Riese, in the province of Treviso, bishop of Mantua and then, for many years, patriarch of Venice⁶², fully grasps the gravity and dramatic consequences of the true exodus that is recorded in the Italian countryside and that, between the end of the nineteenth century and the beginning of the new century, reaches the highest levels in the Italian history⁶³.

However, in order to evaluate the fundamental guidelines and choices made by the Holy See on the side of the religious and material assistance to migrants, it is necessary to recall Pio X's general commitment to the institutional and legal modernization of the Church and to the real reorganization of the central and bureaucratic bases of the Roman Curia, accompanied by the rationalization of the functions of the ecclesiastical system, the reduction and reordering of

⁶⁰ Sanfilippo, *La Chiesa cattolica*, cit., pp. 482, 485.

⁶¹ See Rosoli, *La Chiesa di fronte al secolare fenomeno dell'emigrazione*, in *Per una pastorale dei migranti. Contributi in occasione del 75° della morte di mons. G.B. Scalabrini*, cit., pp. 53-55; Id., *Alcune considerazioni storiche su S. Sede e fenomeno della mobilità umana*, in Pontificia Commissione per la Pastorale delle Migrazioni e del Turismo (Vaticano), *Chiesa e mobilità umana. Documenti della Santa Sede dal 1883 al 1983*, cit., pp. 26-28; Id., *Insieme oltre le frontiere. Momenti e figure dell'azione della Chiesa tra gli emigrati italiani nei secoli XIX e XX*, cit., pp. 562-569.

⁶² On Pio X's life and works see in particular: G. Romanato (ed.), *Pio X. Un papa e il suo tempo*, Cinisello Balsamo, Edizioni San Paolo, 1987; Id., *Pio X. La vita di papa Sarto*, Milano, Rusconi, 1992.

⁶³ See P. Bevilacqua, *Società rurale e emigrazione*, in Bevilacqua, De Clementi, Franzina (edd.), *Storia dell'emigrazione italiana. I. Partenze*, cit., pp. 95-112.

dioceses, the renewal of the clergy's education and the re-launch of the pastoral initiative: a commitment intended to lead to «a substantial strengthening of the Church's work and discipline» and a real centralization and modernization of the institutional and organizational structures of the Church itself, capable of giving new impetus to its action and its initiatives both in the center and in the periphery⁶⁴.

Pius X's interventions on the assistance of Italian emigration abroad are undoubtedly systematic and relevant especially since the end of the first decade of the century. «The religious anxiety», it was rightly underlined, «was associated to organizational instances with the aim of mobilizing all the ecclesial structures to meet the needs of a now rampant phenomenon»⁶⁵, such as the mass exodus from the Italian countryside to the industrialized countries of Europe and to the American continent.

In January 1908, Pope Sarto first recommended to the Italian bishops the establishment of diocesan and parish committees for the emigration, which should be responsible for the protection and guidance of those who were preparing to leave Italy⁶⁶. This initiative, which in the mind of the Venetian Pope should have involved, alongside the clergy in the care of souls, also the associations of the Catholic laity, would be resumed and re-launched, a few years later, in the letter sent on September 8th, 1911 by the secretary of State of Pius X, card. Raffaele Merry Del Val, to the Italian episcopate, on religious assistance, and the charitable activities for the emigrants.

Card. Merry Del Val's letter came about as the result of the increasing attention that the Pontiffs had reserved to the problem of «permanent and temporary emigration of Italian workers abroad» and of the many and varied initiatives of emigrants' protection and spiritual and material assistance promoted by the Church during the past twenty years. Among other things, the commendable work carried out on this side by the numerous male and female religious congregations of ancient and recent foundation interested in the Italian emigrants overseas was underlined, praising the recent decision taken by most of them to join the federation *Italica Gens* (1909)⁶⁷, the association of «national and social character» inspired by the great sense of Christian charity

⁶⁴ On the reform of the Roman Curia launched with the Apostolic Constitution *Sapienti consilio* of June 29th, 1908, as well as the other reform measures promulgated by Pius X, see in particular: R. Aubert, *Pio X tra restaurazione e riforma*, in E. Guerriero, A. Zambarbieri, (ed.), *La Chiesa e la società industriale (1878-1922)*, Cinisello Balsamo, Edizioni San Paolo, 1990, pp. 107-154; G. Romanato, *Pio X. Alle origini del cattolicesimo contemporaneo*, Torino, Lindau, 2014.

⁶⁵ Rosoli, *Insieme oltre le frontiere. Momenti e figure dell'azione della Chiesa tra gli emigrati italiani nei secoli XIX e XX*, cit., p. 562.

⁶⁶ See Secretaria Status [card. Raffaele Merry del Val], *Epistola agli Ecc.mi Arcivescovi e Vescovi d'Italia. Una iniziativa sommamente giovevole*, 25 January 1908, «Actae Apostolicae Sedis», vol. I, 1909, pp. 348-349.

⁶⁷ On this association, see G. Rosoli, *La Federazione «Italica Gens» e l'emigrazione italiana oltreoceano 1909-1920*, «Il Veltro», vol. XXXIV, nn. 1-2, 1990, pp. 87-100.

that, above any political and religious considerations, flows with equal love on everyone of the human family who suffers and needs help»⁶⁸:

One of the dearest topics for the Vicar of Jesus Christ's heart and the subject of his most pious providence – for a period of twenty years has been Pius X's secretary of State – was that of permanent and temporary emigration of Italian workers abroad. This pontifical solicitude, the result of the awareness of the many religious, moral and social dangers to which they are exposed, was translated by the Supreme Pontiffs Leo XIII and Pius X, happily reigning, in acts of great practical importance. [...] Now the Supreme Pontiff Pius X is pleased with the results obtained up to now, thanks to which so many and varied religious, charitable, educational, cooperation and welfare institutions in favor of our emigrants can be admired, a beautiful blossoming of religious and patriotic charity, at one time. In order to achieve such a result many Religious Congregations in Italy contributed, represented in the various countries of our immigration, many of which have recently been confederated. But, the Holy Father is so concerned with the emigrants' fate, that he can not be fully satisfied with it, thus being stimulated by His Highest Mission to seek every way to give this organizations always new improvements that can remedy to the evil, though it did not seem to stop.

Given the above mentioned «beautiful blossoming of religious and patriotic charity, at one time», however, it was necessary, according to card. Merry Del Val, to promote greater coordination and a more capillary and functional distribution in the diocesan and parish context of assistance and charitable institutions:

His Holiness himself is aware – Pio X's secretary of State wrote – that to the emigrant element, especially in the secondary cities, countries and countryside, is not sufficiently well-known the importance of the aforesaid institutions set up in their favor; they often ignores even their existence. So that many of our workers leaves without first seeking a contact with the centers of the aforementioned Institutions, which could certainly illuminate them and address them to the many missions and secretariats that correspond to those centers and that are in the regions where they are going to. The first orientation is thus missing for the emigrants, so that it became difficult, and often impossible, even for the most experienced Catholic zeal to reach them on the unfortunate path and to save them from the pitfalls and evils in which they soon fall. And, in this regard, it is well-known that in some stations especially abroad, for which Italian workers usually pass, and in the most well-known industrial cities, there is always a good number of speculators, propagandists of socialism and also emissaries of Protestantism, who are waiting for the easy prey and deceive emigrants with the seductive mirage of providing them with protection, work and housing; but actually, in the end, they exploit our workers' good faith and precious energies to increase with them the ranks of sectarian proselytism. The first surrender to these evil arts – which unfortunately confirms how operative is the spirit of evil – is the sad prelude to those faults with which these poor workers will later compromise their conscience and their same material well-being: Apostasy, rebellion, and all those disgusting moral disorders, which is better here not to mention.

⁶⁸ *Italica Gens*, «Italica Gens», vol. I, n. 1, 1910, pp. 7-9. But see also R. Venerosi, *La coscienza nazionale fra gli emigrati italiani*, «Italica Gens», vol. II, nn. 8-9, 1911, pp. 297-300.

In particular, as Pius X's secretary of State underlined, «a preventative action in favor of the emigrants» was required, which, entrusted to the pastoral zeal of bishops and parish priests and having the diocesan and parish structures as a reference, should have been based on the establishment of a large and efficient network of *Emigration Committees* able to provide information and support and adequately cope with the serious risks to which peasants and workers preparing to leave Italy to look for luck abroad were exposed to:

A so serious wrong requires a prompt and effective remedy. This is the reason why Your Holiness Himself came in the determination to recommend, for my part, to His Reverend Lordship, as a work of great gratitude to the Lord, and also blessed by civil society, first of all a *preventive* action in favor of the emigrants. It must be promoted in Italy, and in the same parishes to which those who are to emigrate belong respectively. [...] This very important suggestion of general order can then be supplemented with the following special measures: 1. – A *Committee for Emigration* will be established in each Diocese, where there have not already been one. Its purpose will be to act as an intermediary among the Parish priests, on whose cares the workers who are temporarily or permanently expelled depend, and the information offices for the emigrants. 2. – The mentioned Committee shall be established on an initiative and under the presidency of the Ordinary; and the same Ordinary will call charitable and influential people to take part in it, both of the clergy and the laity, who want to consecrate their activity to the noble purpose. The aforementioned Committee will have its seat in the Episcopal city, and it will be able to establish elsewhere the subcommittees, especially where it is necessary to carry out its work with greater readiness and effectiveness, by assigning to each subcommittee the parishes with which it has to correspond. 3. – If the Bishop finds it worthwhile, he will be able to include in the Committee and Subcommittee for Emigration some of the most experienced and active Catholic associations flourishing in his Diocese.

In outlining the purposes and tasks of the *Emigration Committees* that should have been established in the diocese of the peninsula, card. Merry Del Val proposed a sort of *integral pastoral for the migrants*, whose realization was entrusted to the «priestly zeal» and to the «paternal solicitude» of the parish priests, considered in all respects – in the spirit of the Tridentine strongly relaunched by Pope Sarto – real authors and protagonists of the renewed action of assistance and protection of Italian emigration abroad sponsored by the Holy See:

The primary task of the Committee and its Subcommittees for Migration – in the letter of the Secretariat of State was stated – will be to keep in touch with: 1) the above-mentioned Central Information Offices, to inform them in time of the future fate of migrants who will leave the Dioceses and to organize with them all what seems to be useful; 2) with all the Parish priests of the Dioceses, to take advantage of their zeal for the emigrants themselves.

The Parish Priest, which should have been «an intermediate body between the Committee, its Subcommittee and the Emigrants», had a number of fundamental duties:

1) He will inform as soon as possible of the departures that will occur in his parish and, on that subject, will obtain all the data that can give useful suggestions; that is, the number, the profession, the quality of the emigrants, the journey they are going to make, their destination, ecc. This will be immediately communicated to the Committee, or to its Subcommittee, and they, in turn, provide practical suggestions and recommendations in this regard. 2) Being able, in this way, to address and advise those who are to emigrate, the Priest will take care to transmit them the same indications and recommendations; urging them to use them confidently and persuading them of the serious dangers they would encounter if they did not want to benefit from the charitable institutions that exist in their favor in the countries where they will be.

And then, «while the day of departure was approaching», the parish priest was obliged – through special instructions and the solemn celebration of liturgical rituals – to strengthen in the believers who were preparing to leave the community of origin and to emigrate abroad the bond with the fathers' faith and the feeling of belonging to the local church:

He will join them – the card. Merry Del Val wrote – he will give them comfort, will warn them against the particular pitfalls, provide for the tranquility of their conscience, and above all, he will have the care not to let them leave without having them, in a special religious function and devoted solemnity, all together with at Sacred Mess to eat the Bread of the Forts.

The migrants' pastoral care should not be considered finished with their departure from Italy. In fact, the parish priests had the task to keep in touch with the individual parishioners and family groups who were transferred abroad and show them closeness and give advice, even through the correspondence:

After the emigrants' departure – Pope Pius X's secretary recommended –, the parish priest should not consider his task in their regard totally finished. The memory of the paternal affection and of the holy words, with which the good shepherd consoles their commotion and the bitterness of their departure from the native country and their family, will surely remain dear in their soul for some time. But the worries and impressions of the new life would end cancelling it, if their own pastor's work and beneficial and warning voice did not reach them, from time to time, to the foreign soil. Hence, the need for the Parish Priest to have a correspondence with his children to be informed, and in the best way possible for him, of their life and their conditions, to provide, where necessary, with the means The Committee has.

The same priests should, in the end, bear the delicate task of favoring the positive reintegration into the local community of emigrants who returned home and, where necessary, «repairing the damage that the distance from the parish had produced in their souls».

The instructions given in the letter sent on September 8th, 1911 from card. Merry Del Val, to the Italian bishops, outlined a *pastoral of migrants* that was not limited to provide generic forms of moral and spiritual assistance, but that was aimed to safeguard and make more and more solid and significant – in spite

of the distances and the many forms of dislocation that the emigration abroad involved – the ties of the migrant with his parish of origin. The «priestly zeal» and the «fatherly solicitude» of the «good pastor», in fact, the Church of Pius X entrusted the difficult and ambitious task of exercising «a preventative action» on those who were preparing to emigrate, aiming to root in their consciences the sentiment of the fathers' faith and the indissoluble link with the Christian community in which they grew up:

In this regard, the ministry of the good pastor is extremely necessary – the Pope's secretary of State Pius X states –, his main care is to raise his spiritual children, in particular the new generation and the working class, with the nourishment of a religious education, truly sound in doctrine and strong in practice. Better than any other protection that can be devised, this cultivation, sincerely and strongly Catholic, will save the people he loves and will give them hope that his parishioners, even though they are distracted by the affairs of life far from the patriotic ground, will preserve through the trials and dangers, their faith intact, their costumes pure and the Italian name irreproachable⁶⁹.

Aften less than a year, in the framework of the great reform of the Roman Curia launched with the Apostolic Constitution of *Sapienti Consilio* (June 29th, 1908), Pio X implemented what could be considered the most important measure of his whole Pontificate in the field of emigration: the creation, with the *motu proprio De catholicorum in exteris regionibus emigratio* of 15th August 1912, of a special *Emigration Section* with jurisdiction over the whole Church within the Holy Consistory Congregation («Apud Sacra Congregatione Concistoriali novum Officium, seu *Sectionem* ut aiunt, de *spirituali emigrantium cura* constituimus»)⁷⁰, whose powers and competences had been considerably expanded⁷¹.

The creation of a special Office or «Special Section for the Spiritual Care of Migrants» within the Holy Congregation undoubtedly responded to the need for a more consistent and effective central coordination of the initiatives

⁶⁹ Secretaria Status [card. Raffaele Merry Del Val], *Epistola ad Italiae Ordinarios, de operariis ex Italia in exteris nationes migrantibus*, Roma 8 September 1911, «Actae Apostolicae Sedis», vol. III, 1911, pp. 513-518.

⁷⁰ Pius PP. X, *Motu Proprio De catholicorum in exteris regionibus emigratio [Cum omnes catholicos]*, Romae XV Augusti MCMXII, «Actae Apostolicae Sedis», vol. IV, 1912, pp. 526-527.

⁷¹ Established by Pope Sixtus V with the apostolic Constitution *Immensa Aeterni Dei* of January 22th, 1588, under the title of Holy Congregation for the establishment of the Churches and the consistories, this Pontifical Council was reorganized by Pius X with the Apostolic Constitution *Sapienti Consilio* of June 29th, 1908, which greatly expanded its attributions, giving it, among other things, the powers relating to the building of the dioceses, the election of bishops and the vigilance of the government of the diocese, the administration, the discipline and the organization of the studies of ecclesiastical seminaries. In order to emphasize the true centrality of the Holy Consistory Congregation in the framework of the reform of the Roman Curia of 1908, it is sufficient to say that the prefect's role was attributed to the pontiff himself. See Pius PP. X, *Constitutio Apostolica De Romana Curia [Sapienti Consilio]*, Romae XXIX Junius MCMVIII, «Actae Apostolicae Sedis», vol. I, n. 1, 1909, pp. 9-10.

launched by the Holy See. It was, in some respects, an instance promoted several years before by msgr. Giovanni Battista Scalabrini, who, writing to Pio X in July 1904 from Brazil, where he had visited the Italian colonies, had said:

Now the Church, which spends so much money with the admirable institution Propaganda Fide and consumes so many priests for the spread of the faith among the infidels, will not do anything similar for the preservation of faith among the emigrants. And I speak of the emigrants of all the nations and of all the Catholic regions: Italians, Germans, Spaniards, Portuguese, Canadians, and so on. ecc. A special congregation devoted to this issue, the greatest of our century, would honor the Holy See, approach the peoples as a tender mother, and produce an enormous blessing. [...] A congregation that relates with the Bishops, from whom the Catholic emigrants depart and come, and if it not enough, also with their respective governments; which studied the arduous and complex question of emigration in every part, benefiting for the purposes of ancient and modern studies, and on behalf of the Holy Father imposing the provisions of the case, it would be a blessing for the world, and would make Your Pontificate glorious⁷².

The intensification of the initiatives and works of assistance, both on the occasion of departures and the landing places of migratory flows, and the real centralization of the policies in support of the emigrants' pastoral care constituted, however, only one aspect, even if extremely significant, of the most comprehensive strategy pursued by Pope Pio X's pontificate on the side of emigration. The other aspect, no less relevant and strategic, was the recruitment and the cultural and spiritual training of the clergy intended to animate the religious life of the communities of Italian emigrants abroad. In the past, in fact, «the concern of the Church to provide priests in numbers and qualities appropriate to the difficult task of the apostolate among the migrants was continuous, but with little results»⁷³. Hence the choice to focus all the skills on this subject and to set up a special educational institution controlled by the Holy See.

With the *motu proprio De Italis ad externa emigrantibus* of March 13th, 1914, in this regard, Pio X instituted the *Pontificio Collegio per l'Emigrazione Italiana* /Pontifical Council for the Italian Emigration («Urbe Collegium sacerdotum Italis [...] pro Missionalibus Emigrationis») ⁷⁴, who, being at the

⁷² Msgr. Giovanni Battista Scalabrini's letter to the Holy Pope Pius X, S. Paulo (Brasile) 22 July 1904, draft in *Storia della Congregazione Scalabriniana. III: Le prime missioni nel Brasile (1888-1905)*, ed. by M. Francesconi, Roma, Centro Studi Emigrazione, 1973, pp. 284-286. But see also: M. Francesconi, *Un progetto di mons. Scalabrini per l'assistenza religiosa agli emigrati di tutte le nazionalità*, «Studi Emigrazione», (1972), nn. 25-26, pp. 185-203; and G. Terragni, *Un progetto per l'assistenza agli emigrati cattolici di ogni nazionalità. Memoriale di Giovanni Battista Scalabrini alla Santa Sede*, in G. Parolin, A. Lovatin (edd.), *L'ecclesiologia di Scalabrini. Atti del II Convegno Storico Internazionale (Piacenza, 9-12 novembre 2005)*, Città del Vaticano, Urbaniana University Press, 2007, pp. 641-659.

⁷³ Rosoli, *La Chiesa di fronte al secolare fenomeno dell'emigrazione*, cit., p. 54.

⁷⁴ Pius PP. X, *Motu Proprio De Italis ad externa emigrantibus [Iam pridem]*, Romae XIII Martii MCMXIV, «Actae Apostolicae Sedis», vol. VI, 1914, pp. 173-176.

direct dependencies of the Holy Consistory Congregation, besides solving the problem of the lack of ecclesiastical seminars specialized in the pastoral care of Italian emigrants in the American continent, was destined to constitute a kind of laboratory for the education of a highly specialized clergy, from a cultural and Pastoral point of view, able to cope with the dramatic challenges caused by mass emigration⁷⁵.

In the immediately following weeks, the Holy Consistory Congregation, issued two very important measures, both signed by the secretary, Card. Gaetano De Lai. The first was the decree *Sacerdotibus in certas quasdam regiones demigrantibus*, of March 25th, 1914, addressed to the bishops of the American continent and aimed at soliciting the direct responsibility of the churches of destination in the religious care of Italian emigrants. The decree, remedying a situation of serious uncertainty, radically altered the general and not strictly disciplinary provisions introduced by the 3rd Conference of Baltimore in 1884 on the mobility of clergy engaged in the emigrants' pastoral care in America⁷⁶, introducing stricter norms and stronger controls. In the light of this provision, the transfer of a priest to the American territories would have been considered regular only if he had obtained from his bishop the *Litterae discessoriales* in a specific form and received from the bishop of the Diocese of arrival a certain ecclesiastical office⁷⁷.

As mentioned above, the other ordinance issued by the Holy Consistory Congregation was also of fundamental importance, i.e. the decree *De Collegio Sacerdotum pro Italis ad exterarum regiones emigrantibus*, with which the *Regolamento generale del Pontificio Collegio per l'Emigrazione Italiana*/General Regulations of the Pontifical Council for the Italian Emigration was promulgated, established by Pius X with the *De Italis ad externa emigrantibus* of March 13th, 1914.

The Council, as the General Regulations affirmed, had «the purpose of educating young priests of Italian secular clergy in the exercise of the holy ministry for the benefit of their compatriots emigrated abroad» and, so it depended «directly on the Holy Consistory Congregation», which dictated the rules and controlled its moral, scientific and economic progress».

The Director of the Council for the priests' education, who had the task of the «spiritual care of the Italian emigrants», was «a priest appointed directly by the Supreme Pontiff by the name of Rector», to whom «all the attributes» of

⁷⁵ See A. Perotti, *Il Pontificio Collegio per l'emigrazione italiana 1920-1970*, Roma, Pontificio Collegio per l'Emigrazione – UCEI, 1970.

⁷⁶ See Tit. II, cap. VII, § 2, in *Acta et Decreta Concilii Plenarii Baltimorensis Tertii. A.D. MDCCCLXXXIV*, Praeside Ill.mo ac Rev.mo Jacobo Gibbons, Baltimore, Typis Joannis Murphy et sociorum, MDCCCLXXXVI, p. 34.

⁷⁷ Sacra Congregatio Concistorialis [card. Gaetano De Lai], *Decretum De Sacerdotibus in certas quasdam regiones demigrantibus [Ethnografica studia]*, Romae 25 Martii 1914, «Actae Apostolicae Sedis», vol. VI, 1914, pp. 182-186.

the «seminary rectors» were recognized. In carrying out his office, the Rector would be assisted by a deputation consisting of four priests «chosen by the Supreme Pontiff», «two for the discipline, and two for the administration»:

They – the General Regulations affirmed – will join under the presidency of the Cardinal Secretary of the Holy Consistory Congregation. [...] There will also be a spiritual director of the Council, to be chosen by the Cardinal Secretary of the Consistory Congregation with the Council of Deputies, having heard the Cardinal Vicar and with the Supreme Pontiff's approval.

And then:

Another priest must be chosen to assist the Rector in disciplinary matters, as well as in the Council administration. His appointment will be made by the Cardinal Secretary of the Consistory Congregation, on the Rector's proposal, with the Council of Deputies and after hearing the Vicar Cardinal.

The guidelines contained in the *General Regulations* concerning the moral and spiritual profile of the young priests admitted to the Council were characterized by a vivid awareness of the onerous pastoral tasks of the clergy destined to the Italian emigration abroad.

The purpose of the Institute was the education of young priests for the moral and religious assistance of the Italians emigrated abroad, so that only those priests who for their moral and intellectual qualities, their age and physical constitution, their attitudes and inclinations seem reliable to that purpose. [...] The regular stay in the Council will be of two years. However, it may be reduced to one year, given special needs to provide for some mission, and if the pupil will appear sufficiently educated.

The directives concerning the educational curriculum and the ordering of the studies that would have to characterize the internal schools of the *Pontifical College for Italian Emigration* developed by the Holy Congregation were also particularly interesting. The attention paid to the study of foreign languages – «English, French, Spanish, Portuguese and German» – was also noteworthy, and also the analysis of the «civil laws and special conditions of the countries where emigration is stronger and the pupils will be addressed».

For what concerns the theological studies and the religious sciences, the preparatory course reserved to the pupils of the College included compulsory study of disciplines such as apologetics, pastoral care, sacred liturgy and ecclesiastical singing, but it also suggested the introduction of some «special schools, mainly of canon law, in order to make them more suitable to the mission they are preparing for»⁷⁸.

⁷⁸ Sacra Congregatio Concistorialis [card. Gaetano De Lai], *De Collegio Sacerdotum pro Italis ad exterarum regiones emigrantibus* [Regolamento generale], Roma 24 giugno 1914, «Actae Apostolicae Sedis», vol. VI, 1914, pp. 547-550.

Actually, despite the commitment and solicitude shown by Pius X's Church for the education of the clergy dedicated to the migrants' assistance and pastoral care, the *Pontifical College for Italian Emigration* started operating only in 1920⁷⁹. The outbreak of the First World War was, in fact, stopped a lot of the initiatives launched on this side by the Holy See and made the interventions in support of the Italian emigration overseas much more problematic. In a circular letter sent to the Italian bishops on December 6th, 1914, the secretary of the Holy Consistory Congregation pointed out the very tepid reactions in the various Italian dioceses for the collection of the believers' offerings for the Support of the College:

The pain and concern for the tremendous curse of the present war, which, as an imminent disaster, threatens a great part of the world – card. Gaetano De Lai wrote – have not distracted the Holy See's attention from the Italian emigration's fate. In fact, he had already addressed his paternal concerns for its improvement – both in the spiritual dimension and in the charitable service – with various measures, especially with the *Motu Proprio Iam Pridem* on 19th March of that year. With this document [...] the Supreme Pontiff [...] announced the establishment of a College for the education of the priests who intend to devote themselves to the assistance, establishing that the sums collected through the usual collections to be made by the Ordinari d'Italia in favor of the emigrants, were sent to the Special Section of the Holy Consistory Congregation, so that they could be useful for this College and the institutions mentioned above. But up to now, because of the painful events that have changed in recent times, the offerings arrived at the Office of the Holy See is far from matching the hopes placed in the generosity of the faithful, aware of the importance and severity of the problems connected with the Italian emigration. It, far from diminishing, will only increase when, as God likes, this war will end, which closes the ends of Europe to the masses of workers, and the economic crises will cease, affecting the two Americas where over four million Italian citizens live. These considerations have moved the Holy Father Benedict XV's heart, who, in accordance with His Predecessor's provisions regarding the emigrants' assistance, wishes to see the College of Priests, aspiring to their spiritual care opened as soon as possible⁸⁰.

4. *From the First World War to Pius XII's Apostolic Constitution Exsul Familia (1952): the Church «mother of all nations and all peoples» in the face of the new world dimensions of migration processes»*

The season inaugurated with the outbreak of World War I, was intended to bring about profound changes in the field of migration. The forced and

⁷⁹ See Sacra Congregatio Concistorialis [card. Gaetano De Lai], *Notificatio De Pontificio Collegio Sacerdotum pro Italis ad externa emigrantibus*, Romae 26 Maii 1921, «Actae Apostolicae Sedis», vol. XIII, 1921, pp. 309-311.

⁸⁰ Sacra Congregatio Concistorialis [card. Gaetano De Lai], *Litterae circulares ad R.mos Ordinarios Dioecesium Italiae, de spirituali emigrantium cura*, Roma 6 dicembre 1914, «Actae Apostolicae Sedis», vol. VI, 1914, pp. 699-701.

almost total suppression of expatriation flows in the years of the conflict was followed by their gradual recovery, conditioned however by the profound transformations in the economic field and international labor market. The restriction laws launched in 1921 and 1924 in the United States and, at the same time, the recurring productive crises and the resulting saturation of the labor market in the traditional destinations of Italian emigration in Latin America (Argentina, Brazil, ecc.) were destined, as is well known, to drastically reduce trans-oceanic mobility and to make the European destinations prevalent, first of all France, with «more than one and a half million of expatriations between 1916 and 1942», followed by Switzerland, Great Britain and Benelux⁸¹.

The period between the two wars, as Gianfausto Rosoli recalled, «represents a particularly delicate moment for the political affirmation of the various forms of left and right totalitarianism and the open conflict that the Church will be subjected to in different parts of Europe and Latin America. Even in the emigration sector, there is a time of stagnation of the flows and even of the crisis of many welfare institutions»⁸².

The particular increase in the migration flows to Europe was reflected in the ever-wider and more complex initiative of the *Opera di assistenza per gli italiani emigrati in Europa e nel Levante* headed, after msgr. Geremia Bonomelli's death (1914), by the bishop of Vicenza msgr. Ferdinand Rodolfi⁸³. The latter, aware of the traditional difficulties of mobilizing the Italian diocesan realities and of the urgent need to co-ordinate the forces operating in the religious assistance to temporary emigration in the old continent, leaving in 1920 the charge of President of the *Opera Bonomelli*, proposed to the Holy See to establish a special ecclesiastical figure, with bishop's dignity, but not burdened by the commitments associated with the pastoral guidance of a diocese, to which the direction and coordination of all the activities concerning the religious assistance to Italian emigrants in Europe and in non-European territories.

A few months later, on October 23th, 1920, with a secretary of the Holy Consistory Congregation's notification, the office of the *Prelate for Italian Emigration* was established, whose competence was not limited to Europe but extended to all countries in which there were colonies of immigrants from the peninsula. When retracing the genesis of this provision, card. Gaetano De Lai underlined the fundamental role played, up to that point, on the moral and

⁸¹ Favero, Tassello, *Cent'anni di emigrazione italiana (1876-1976)*, cit., pp. 30-31. But see also: A. De Clementi, *La «grande emigrazione»: dalle origini alla chiusura degli sbocchi americani*, in Bevilacqua, De Clementi, Franzina (edd.), *Storia dell'emigrazione italiana. I. Partenze*, cit., pp. 187-211; e P. Corti, *L'emigrazione temporanea in Europa*, *ibid.*, pp. 213-236.

⁸² Rosoli, *La Chiesa di fronte al secolare fenomeno dell'emigrazione*, cit., p. 58.

⁸³ See, in this regard: *L'Opera Bonomelli a Vicenza: 1914-1919*, Vicenza, Opera Bonomelli, 1919; G.B. Zillo, *Un condottiero d'anime: mons. Ferdinando Rodolfi, vescovo di Vicenza*, Vicenza, Tip. San Giuseppe, 1959, pp. 222-240; and L. Bordin, L. Zancan, *Il vescovo Ferdinando Rodolfi e l'Opera Bonomelli per gli italiani emigrati in Europa*, Vicenza, Tip. Editrice Peretti, 1997.

material assistance to Italian emigration abroad by the *Opera Bonomelli* and the *Italica Gens* Federation, as well as the relevant remarks and proposals, «in order to improve [...] the ecclesiastical assistance of the emigrants», advanced by the bishop of Vicenza msgr. Ferdinand Rodolfi:

There are some companies in Italy – the secretary of the Holy Consistory Congregation recalled – such as the *Bonomelliana* and the *Italica gens*, composed of many lay people who, with the intellect of love and Christian sentiment, devote their work to the assistance of Italians who emigrate or have already emigrated abroad. And although these societies have primarily civilian purposes, they still like to use priests and religious men for the emigrants' assistance, who addressing them to the various centers and committing them to their care. These societies, however, using the priests as their missionaries, underwent from the very beginning the necessity of coming to an agreement with the ecclesiastical authority, in order to give to these priests a superior from which they were canonically dependent, and to whom they should refer. So, in the *Bonomelliana*, an ecclesiastical Council was created, under the patronage of the Archbishop of Turin, and then of that of Milan. This council was later recognized by the Holy See, and was headed by the Bishop of Vicenza. Similarly, the National Association for the Protection of Missionaries, in establishing the *Italica gens* for the care of trans-oceanic emigrants, felt the need to summon the superiors of the various Orders and Congregations to cooperate in their new work. During the year, then, the Bishop of Vicenza, after having asked for and obtained the exemption from his office for the important occupations of his vast diocese, became greater for the lousy devastations of that territory after the last great war, proposed to the Holy See some considerations already discussed with the *Bonomellian* moderators in order to improve the emigrants' ecclesiastical assistance as far as possible.

The card. Gaetano De Lai underlined that the right considerations advanced by the bishop of Vicenza had urged the Holy See to take immediate actions:

Thus, after the Eternal Fathers of the Holy Consistory Congregation had analysed and studied the matter with diligence, the Pope Benedict XV established the following: 1) that a Prelate free from a diocese devoted all his activity to the choice, care and vigilance of the priests who are in charge of the assistance of Italian emigrants abroad, maintaining always safe the rights of the Ordinaries of these priests, and of the Ordinaries of the place where the emigrants are; and that he should have the same faculties of the Bishop of Vicenza [...]; 2) that the task of this Prelate should not be confined to the priests and missionaries hired by the *Bonomelliana*, but to all those who by other similar societies were called at the same level or who would in any case provide religious assistance to Italian emigrants.

The responsibilities attributed to the new figure of ecclesiastical leader instituted by the notification of 23th October, 1920 were in fact much wider than those previously performed by the bishop of Vicenza and president of the *Opera Bonomelli*: the *Prelate for Italian Emigration*, in fact, was also appointed as the superior of the *Pontifical College for Italian Emigration* created by Pio X with his own motu proprio *De Italis externa emigrantibus* of 13th March 1914 and remained, until then, on paper because of the outbreak of the First World War. In this regard, the measure issued by the Holy Consistory Congregation of pointed out that

being close the establishment of the College of Priests, established by Pius X, this Prelate, for the preparation and better education of the priests for the assistance of the Italian emigrants, was also the Superior of this College, holding its leadership and government under the high leadership Holy Consistory Congregation, so that he could easily know the staff suitable for the emigrants and charitable institutions in accordance with their needs⁸⁴.

In the final part, the notification of the Holy Consistory Congregation also stated that Pontiff Benedict XV had chosen «for the delicate and important office» of Prelate for Italian emigration, «the priest Michele Cerrati, former Vicar of the Italian Military Bishop» and he had given him the title of «bishop of Lidda»⁸⁵. Cerrati would be followed, in 1925, by msgr. Rocco Beltrami, died early in 1929 and replaced, from 1931, by msgr. Erminio Viganò, who would have kept this office until his death in 1949⁸⁶.

The figure of the *Prelate for Italian Emigration* would be abolished following the reorganization of the system of religious assistance to emigrants by the Apostolic Constitution *Exul Familia*, promulgated by Pope Pius XII on 1st August, 1952. But actually, since 1930s, this figure had undergone a reshaping with respect to the original role and competencies, following the forced closure of the *Pontifical College for Italian Emigration*, whose training courses for priests to be assigned to Italian communities abroad had been suspended as a result of the drastic drop in vocations and of the parallel and increasingly marked contraction of migratory flows from the peninsula⁸⁷.

From the second half of the 1920s to the outbreak of the Second World War there were a number of attempts by the fascist regime to exercise direct control over the ecclesiastical organizations and structures of the Catholic laity involved in the emigrants' assistance. Among other things, as a result of the infiltration of certain elements linked to the *Fascist National Party* in its governing bodies, in 1927 the Holy See was forced to dissolve the body of missionaries of the *Opera Bonomelli*⁸⁸. More generally, the Church's attitude towards the repeated attempts of exploitation and control by the fascist regime for the purposes of

⁸⁴ Sacra Congregatio Concistorialis [card. Gaetano De Lai], *Notificazione Circa la costituzione di un Prelato per l'emigrazione italiana*, Roma 23th October 1920, «Actae Apostolicae Sedis», vol. XII, 1920, pp. 534-535.

⁸⁵ *Ibid.*, p. 535.

⁸⁶ On the role played by the *Prelate for Italian emigration* in the vast and complex context of the USA, see S.M. Tomasi, *L'assistenza religiosa agli italiani in USA e il Prelato per l'Emigrazione Italiana 1920-1949*, «Studi Emigrazione», vol. XIX, n. 66, 1982, pp. 167-189. With referenc to Italian emigration in Europe, see P. Borruso, *Missioni cattoliche ed emigrazione italiana in Europa (1922-1958)*, Roma, Istituto Storico Scalabriniano, 1994.

⁸⁷ In the period in which it had fully worked, i.e. between 1921 and 1933, the *Pontificio Collegio per l'Emigrazione Italiana* had educated 167 priests destined to carry out their pastoral ministry in Italian communities abroad. See Perotti, *Il Pontificio Collegio per l'emigrazione italiana: 1920-1970*, cit., pp. 146-147.

⁸⁸ See Ph. Cannistraro, G. Rosoli, *Emigrazione, Chiesa e fascismo. Lo scioglimento dell'Opera Bonomelli (1922-1928)*, Roma, Studium, 1979.

ideological penetration and political propaganda within the communities of Italian emigrants abroad was, in general, of decisive refusal and clear contrast. In this respect, Gianfausto Rosoli rightly recalled the «strong commitment» of the Holy Consistory Congregation to «oppose to the exploitation of the clergy and the disadvantages of their juridical and disciplinary autonomy», as well as the resistance to the regime officials' maneuvers by the Vatican nuncios' and by most of the priests and religious men working with the emigrated populations:

We believe that the failure or the low incidence of so many fascist initiatives abroad – Rosoli wrote – [...] have been the result of [...] the solid and coherent work of emigration missionaries who have tried to defend their role from politics, reacting to absolutism and statism in an important sector, such as the religious one. [...] Religious zeal was perhaps the most effective, long-distance, neutral opposition to fascism, which appeared as the practical doctrine that was in continuity with the Jacobian tradition of the Risorgimento. [...] The struggle, often unknown to missionaries, was to defend from political interferences those strictly religious contents that gave the meaning to their commitment to a so difficult ministry, exposed to the misunderstandings of so many recipients of their action, for those «distant people», even from the political convictions of the regime, for which the missionaries were exposed to the blackmails of Fascism⁸⁹.

The years of World War II were intended to record a true step up the ladder in the attitude of the Holy See in regard to migratory phenomena and the problems of the migrants' pastoral care. Consistent with the vast and multifaceted work carried out during the years of the conflict in favor of the prisoners of war and refugees from all countries⁹⁰, Pius XII's Church felt the need to give its own action, which until that time was focused above all on Italian emigration, an authentically universal horizon⁹¹.

This new approach is already evident in the Christmas radio message of 1945, in which Pope Pacelli underlined the dramatic international situation given by the recent conflict and the role of «mother» of the «nations» and of «peoples» that the Church was called to exercise:

The Church – the pontiff said – is the mother, *Sancta Mater Ecclesia*, a true mother, the mother of the all nations and of all peoples, and of all the single men, and precisely because it is a mother, it does not belong or can belong exclusively to this or that people, and to

⁸⁹ Rosoli, *Insieme oltre le frontiere. Momenti e figure dell'azione della Chiesa tra gli emigrati italiani nei secoli XIX e XX*, cit., pp. 621-624.

⁹⁰ See, in this regard, the monumental collection ed. by P. Blet, A. Martini, B. Schneider (edd.), *Actes et Documents du Saint Siège relatifs à la seconde guerre mondiale*, 11 voll., *Città del Vaticano*, Libreria Editrice Vaticana, 1970-1981. A useful presentation of this collection is in R.A. Graham, *Alle origini degli «Actes et documents du Saint-Siège»*, in A. Riccardi (ed.), *Pio XII*, Roma-Bari, Laterza, 1984, pp. 265-273.

⁹¹ See A. Riccardi, *La Chiesa di Pio XII, educatrice di uomini e di popoli tra certezze e crisi*, in *Chiesa e progetto educativo nell'Italia del secondo dopoguerra (1945-1958)*, Brescia, La Scuola, 1988, pp. 9-36.

one people more and to another less, but to all likewise. It is a mother, so it can be foreign nowhere; it lives, or at least because of her nature it has to live in all peoples. [...] The Church is therefore supranational [...] because embraces all nations and peoples with the same love, it is also so, as we have already mentioned, because it is foreign nowhere⁹².

A few weeks later, in the allocution to the new cardinals on 20th February, 1946, Pius XII reiterated the necessity and urgency that the Church, «mother and educator of peoples and nations», took care of all those who were kept away from the country of origin by the «emigration» or the condition of «prisoner of war»:

The Man, as God wants him to be and the Church embraces him, – the pontiff said – will never feel firmly fixed in the space and time without stable territory and without traditions. Here, the strong people find the source of their fiery and fertile vitality, and the weak, who are the majority, dwell safely against penitence and apathy, against the decay of their human dignity. The Church's long experience as educator of peoples confirms it; it therefore cares to associate religious life with the customs of the country in any way and cares with particular attention those who are kept away from the native country by emigration or military service. The wreckage of many souls sadly gives reason to this motherly apprehension of the Church and obliges us to conclude that the stability of the territory and the attachment to the traditions that are indispensable to the healthy integrity of man are also fundamental elements of the human community. However, it would obviously be a reverse of the beneficial effect of this postulate, if one wanted to use it to justify the forced repatriation and the denial of the right of asylum to those who for serious reasons wish to set their residence elsewhere.

And then:

The Church elevates man to the perfection of his being and his vitality to give human society such trained men: men set up in their inviolable integrity as images of God; men proud of their personal dignity and their healthy freedom; men jealous of the equality with their peers in all that forms the most intimate fund of human dignity; men firmly attached to their land and their tradition; men, in one word, characterized by this fourfold element, this is what gives human society its solid foundation and provides security, balance, equality, normal development in space and time. Such is also the true meaning and practical influence of the supranationality of the church, which – far from being like an Empire – rising above all the differences, of all spaces and times, incessantly builds on the stable foundation of every human society⁹³.

Following the Universalist openings and the renewed commitment to refugees and migrants expressed in the post-war years by Pacelli, the *Commission Internationale Catholique pour les Migrations* (CICM) was set up in Geneva in 1951. It was an international organization officially recognized by the Holy

⁹² Pius PP. XII, *Sermo in pervigilio Nativitatis D.N. Iesu Christi*, 24th December 1945, «Actae Apostolicae Sedis», vol. XXXVIII, 1946, pp. 18-25.

⁹³ Pius PP. XII, *Allocutio adstantibus E.mis Rev.mis Patribus Cardinalibus recenter creatis*, 2nd February 1946, «Actae Apostolicae Sedis», vol. XXXVIII, 1946, pp. 146-148.

See⁹⁴ and destined to coordinate the work and initiatives of ecclesiastical bodies and patronage and confessional associations in favor of those who were forced to emigrate for economic reasons or to leave their country because of the war⁹⁵. The turning point represented by Pio XII's pontificate was sealed with the promulgation on the 1st of August, 1952, of the Apostolic Constitution, *Exsul Familia*, an organic act on the migrants' pastoral care, which was largely addressed to the universal Church and not just to the Italian Church⁹⁶. This document, not surprisingly, was considered the great charter of the Church in terms of emigration⁹⁷, and comprehensively and systematically addressed the most important problems of the pastoral and migrants' care and of all those who were forced to live away from their homeland (refugees, prisoners of war, refugees, ecc.), making a new and effective synthesis of the directives issued so far by the Holy See on this subject:

For what concerns the contents – as Gianfausto Rosoli rightly reminded, – *Exsul Familia* was re-affirming many of the Church's traditional statements, accentuating the most modern aspects: natural right to emigrate, universal destination of the land products, and orientation towards better distribution of the riches in the world; restrictionism was judged in a very strict way when it was unjustified or dictated by fears or prejudices. A more universal conception of the Church was affirmed and an interaction among clergymen from different parts of the world was suggested. [...] On the plan of pastoral tools, the papal document recommended the erection of national and personal parishes, where appropriate, with the competence of the believers of a particular nationality. They were entrusted to priests of the same language or nationality duly authorized by the Consistorial Congregation. The role of this ministry was of fundamental importance in coordinating efforts at international level and in homogenizing the tools⁹⁸.

The Apostolic Constitution *Exsul Familia* of 1952 was intended to have a remarkable influence not only at an operational level, but also on that of the inspirational principles and strategic lines of the 'new course' imparted by Pacelli's pontificate to the work of the Church on the side of emigration⁹⁹, so it established the abolition of the office of the *Prelate for Italian Emigration*,

⁹⁴ Commissione Cattolica Internazionale per le Migrazioni, in civitate Genevensi year 1951: Letter of the State Secretary to MR. James I. Norris, Provisional President of the International Catholic Migration Commission, Geneva (Switzerland), *Le sono ben noti gli imperiosi motivi*, 12 April 1951, n. 226960/MSA.

⁹⁵ See *Documentation de la Commission Internationale Catholique pour les Migrations*, Genève, I.C.M.C., 1954.

⁹⁶ Pius PP. XII, *Constitutio Apostolica De spirituali emigrantium cura [Exsul Familia]*, Arce Gandulphi, apud Romam, anno Domini millesimo nongentesimo quinquagesimo secundo, die prima mensis Augusti, «Actae Apostolicae Sedis», vol. XXXXIV, 1952, pp. 649-704.

⁹⁷ See G. Tessarolo, *Exsul Familia, The Church's Magna Charta for Migrants*, New York, St. Charles Seminary, 1962.

⁹⁸ Rosoli, *La Chiesa di fronte al secolare fenomeno dell'emigrazione*, cit., pp. 58-65.

⁹⁹ See G. Ferretto, *A igreja e as migrações. A integração dos imigrados catolicos segundo a «Exsul Familia» e outros documentos pontificios*, Lisboa, O.C.P.M., 1962, pp. 32-57.

instituted by the Holy Consistory Congregation secretary's notification of the 23rd October, 1920. In its place, in line with the supranational and universalist approach of the Vatican policy, the figure of the *Delegate for the Emigration Works of the Holy See* was created, whose powers were no longer limited to Italian emigration but extended to the emigrated believers «of any race, language, and nation»¹⁰⁰.

Conclusions

The turning point in contemporary Catholicism represented by the Second Vatican Ecumenical Council (1962-1965) made possible, over a decade after Pius XII's *Exsul Familia*, a further and fundamental step forward in the Church's emigration strategies and policies. On August 15th, 1969, Pope Paul VI promulgated the apostolic letter *Pastoralis Migratorum Cura*¹⁰¹, followed a few weeks later by the instructions prepared by the Holy Congregation for Bishops (former Holy Consistory Congregation)¹⁰² on the theme of *De Pastoralis Migratorum Cura*¹⁰³. These documents applied to the broad and complex context of migrants' pastoral care the fundamental guidelines and ecclesial and pastoral openings arising from the reflection of the Second Vatican Ecumenical Council.

With the *Pastoralis Migratorum Cura*, in fact, Pope Montini aimed to implement «the Council's directives for the revision of the rules for migrants' pastoral care». *De Pastoralis Migratorum Cura* was, in this regard, the instrument for the concrete implementation of such a review. Characterized by «a clear approach to the phenomenon of migration, presented in its entirety and complexity through a reading full of sociological, moral and religious ideas and pastoral directions», the document prepared by the Holy Congregation for Bishops offered a broad perspective. In it

Migrants' assistance is no longer just a question of priests, but of all the people of God, with specific roles and responsibilities for each of its members. Local Ordinaries have their

¹⁰⁰ See A. Caretta, *I missionari degli emigranti nella Costituzione apostolica «Exsul Familia»*, Roma, Edizioni Giunta Cattolica Italiana per l'Emigrazione, 1957, pp. 68-92.

¹⁰¹ Paulus PP. VI, *Litterae Apostolicae motu proprio datae quibus novae normae de pastoralis migratorum cura statuuntur [Pastoralis Migratorum Cura]*, Romae, die XV mensis augusti, anno MCMLXIX, «Actae Apostolicae Sedis», vol. LXI, 1969, pp. 601-603.

¹⁰² As it is well known, in the context of the reorganization of the Roman Curia operated by Paul VI with the Apostolic Constitution *Regimini Ecclesiae universae* of August 15, 1967, the Holy Consistory Congregation had assumed the new denomination of the Holy Congregation for Bishops and had been given new skills.

¹⁰³ *Sacra Congregatio pro Episcopis, Instructio de pastoralis migratorum cura*, Romae, die 22 augusti 1969, «Actae Apostolicae Sedis», vol. LXI, 1969, pp. 614-643.

primary and unique responsibility, but are not left alone; Bishops' Conferences also have a wide range of responsibilities. There is also an active collaboration between the Church of departure and the Church of arrival, even with different roles. The missionary figure is described with care: his preparation is urged, his rights guaranteed and the means to carry out his task offered. Above all, the notion of migrant is overcome, in which only migrant parents and their children were included. The specific care of migrants [...] has no time and generation limitations¹⁰⁴.

Even on the more specifically Italian side, the Church's commitment to pastoral and migrants' care made a significant development during the post-war period. In June 1946, the *Comitato Cattolico Nazionale per l'Emigrazione* (CCNE) was formed, then transformed into the *Giunta Cattolica Italiana per l'Emigrazione* with the function of coordinating the numerous confessional organizations operating in the sector.

On 3 February 1953, the *Direzione Nazionale delle Opere di Emigrazione per l'Italia* was set up, with the aim of coordinating the network of diocesan committees and Catholic associations for emigration, and organizing the *Giornata Nazionale dell'Emigrante* and making propaganda and raising public awareness on the problems of emigration.

In 1965, the newly established Conferenza Episcopale Italiana (CEI) established the Commissione Episcopale Italiana per l'Emigrazione, which was called upon to manage, in the spirit of the new Council's directives, the transfer of powers on Italian emigration from the Holy See to the Conferenza Episcopale Italiana (CEI) itself. At the same time, the Ufficio Centrale per l'Emigrazione Italiana (UCEI), was established as the executive organ of the CEI, to carry out the functions previously carried out by the Direzione Nazionale delle Opere di Emigrazione per l'Italia and the Giunta Cattolica Italiana per l'Emigrazione¹⁰⁵.

Finally, in the autumn of 1987, the Conferenza Episcopale Italiana (CEI) established the Foundation *Migrantes*¹⁰⁶, where the UCEI and various organizations involved in the immigrants' and emigrants' care, internally displaced people, refugees, Rom and Sinti, circus performers, seamen ecc.

A change made necessary by the fact that, in the meantime, the national and international scenario has radically changed and that, over the last few decades, Italy as a country of emigration has now become an immigration country. An epochal transformation of great impact, which – still today – presents to the Italian Catholic Church new and dramatic challenges on the religious and pastoral side, as well as on that of the human rights and civil coexistence.

¹⁰⁴ V. De Paolis, *Aspetti canonici del magistero della S. Sede sulla mobilità umana*, in Pontificia Commissione per la Pastorale delle Migrazioni e del Turismo (Vaticano), *Chiesa e mobilità umana. Documenti della Santa Sede dal 1883 al 1983*, cit., p. XXXVII.

¹⁰⁵ See S. Ridolfi, *L'assistenza pastorale agli italiani nel Dopoguerra*, in Fondazione Migrantes, *Rapporto italiani nel mondo 2009*, Roma, Centro Studi e Ricerche IDOS, 2009.

¹⁰⁶ See Fondazione Migrantes, *Ventennale della Migrantes (1987-2007)*, Roma, Quaderni di Servizio Migranti, 2009.

Britain in the imperial age: history and national identity

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ABSTRACT: The period between the late 19th and early 20th centuries in the modern world history was a time span in which some capitalist European states perceived the world as an imperial battleground. During this period conceptualized as «imperial age», history education was utilized as a pioneer of constructing imperial identity in Britain, and this conservative construction was fortified through invented patriotic symbols and monarchic rituals. Imperial vision and values of the British Empire was transferred to the new generation through history education. This article analyzes the conservative and imperial mission the British Empire attributed to history education. In this respect, official publications of the Board of Education, books and journal articles concerning history education published between 1890s and 1940s were analyzed from a political, ideological and cultural perspective.

EET/TEE KEYWORDS: History of Education; Britain; Invention of tradition; Nationalism; Historiography; XIX-XXth Centuries.

Introduction

Many sources on nationalism have defined nations as «imagined» or even «invented» communities¹. Scholars concerned with this topic have stressed the

¹ E. Gellner, *Nations and Nationalism*, Ithaca, Cornell University Press, 1983; B. Anderson,

importance of the analysis of constructing a national identity within nation-states. From this perspective, nation-states have attempted to legitimize themselves by basing their discourse on the depth of their past and historical continuity over time and utilize *history for the creation of the collective memory*. According to Hobsbawm's definition, this has been a process of the «invention of tradition»; a process of formalization and ritualization, characterized by reference to the past². Debates on history and its teaching have, therefore, mostly centered around important questions relating to «state formation», «patriotism» and «nationalism».

From this perspective, nationalism, since its emergence until the present day, has been the means of providing the development of state-controlled educational systems in many countries. Schools, the main places where most educational activities occurred, were one of the most important ideological tools of the reproduction of modern social formation³. In our case this is nationalism and this tool aimed to have children adopt the official and dominant ideology of the state and the society⁴. In the educational process, this indoctrination was more strongly evident in history education. For that reason, modern states have at various times become interested in, and attempted to control history education in schools; school history has been used as a tool of «state socialization», geared to the teaching of the national past to generate identification with the nation and the state⁵. Thus, history has been one of the most controversial subjects of the school curricula. The opportunity to discuss and understand the formation of identity and possibly control it was making history an essential and controversial part of any curriculum⁶. The debate concerning history education both among politicians and educationists was focused upon the methods of teaching history – «how to teach it» – and more importantly, about

Imagined Communities: Reflections on the Origin and Spread of Nationalism, London, Verso, 1991; E. Balibar, I. Wallerstein, *Race, Nation, Class: Ambiguous Identities*, London, Routledge, 1991.

² E. Hobsbawm, *Introduction: Inventing Traditions*, in E. Hobsbawm, T. Ranger (edd.), *The Invention of Tradition*, Cambridge, Cambridge University Press, 1983, pp. 1-14.

³ L. Althusser, *On Ideology*, London, Verso, 2008, pp. 29-31.

⁴ For this reason, in the first half of the 20th century, not only history education, but also life science courses containing the basic knowledge and skills children required in their personal life, were under the control of the school. Henceforth, parental duties were limited to the nutrition and care of their children. See. A. Prost, *Aile ve Birey*, in P. Ariés, G. Duby (edd.), *Özel Hayatın Tarihi*, Turk. transl. Ş. Aktaş, İstanbul, Yapı Kredi Yayınları, 2010, vol. 5, pp. 85-87, 91. With the modern age, the mass emerged as a new political subject apart from clergy and aristocracy, that ought to be assimilated/integrated with the state. This was one of the main motives underlying the modern state establishing of free/public schools for this mass. C.J.H. Hayes, *Nationalism: A Religion*, New York, Macmillan, 1960, pp. 86-87.

⁵ V.R. Berghahn, H. Schissler, *Perceptions of History: International Textbook Research on Britain, Germany and the United States*, Oxford, Berg, 1987.

⁶ G. Baldwin, *In the Heart or on the Margins: A Personal View of National Curriculum History and Issues of Identity*, in R. Andrews (ed.), *Interpreting the New National Curriculum*, London, Middlesex University Press, 1996, p. 139.

the selection of and justification for history – «what history to teach and why teach it»⁷.

In this respect, history education in schools started to gain ideological feature in line with the requirements of the modern state. As Clark asserted, the role of university history could be deconstruction, but popular (and school) history contained an element of celebration thus the question was what to celebrate⁸. Within this scope, popular history and history in schools turns into an arena of cultural hegemony; thus, the argument that arises is not whether history should be patriotic, but what form patriotism should take.

To sum up, in this period when nationalism reached its peak, the history education given in European schools and universities was either utilized as the process of forming political unity or the strengthening of existent political unities. Hence, history education was seen as a part of citizenship⁹. From this viewpoint, the main argument in this article is that the prevailing paradigms of certain periods are reflected in the educational policies and thus, the mission attributed to history education is largely dominated by the conditions of those periods. More specifically, history education was seen as a tool to construct a national identity, therefore it was utilized to instill nationalistic and patriotic values during the late 19th and early 20th centuries.

Based upon this main argument and with specific reference to Britain, this study aims to demonstrate how shifts in social and political context of the early 20th century are linked to educational policies, how the process of nation-building has affected nationalist historiography and how they impacted on the perception of academics and educators in relation to the purpose and content of history education. To achieve this aim, official publications on history in schools published between 1905 and by the Board of Education, were analyzed. Particularly valuable sources were the series of *Handbook of Suggestions* and reports on teaching history, which reveal governmental policies and their perceptions on history education filtered from the state's political, ideological and cultural frame. Moreover, books and journal articles written by historians and educationalists about history education in between 1890s and 1940s were examined in order to determine their thoughts and suggestions concerning the function of history. Furthermore, the effects of the prevailing worldviews on the discourse of the government together with the historians and educators throughout the specified time were investigated and analyzed with reference to the aims and content of school history teaching.

⁷ R. Phillips, *History Teaching, Nationhood and the State*, London, Cassel, 1998.

⁸ J. C.D. Clark, *National Identity, State Formation and Patriotism: The Role of History in the Public Mind*, «History Workshop Journal», n. 29, 1990, pp. 95-102.

⁹ P. Burke, *History and Social Theory*, New York, Cornell University Press, 1993, pp. 5-6.

1. *Being Citizen in Imperial Britain*

Every educational system and process is affected and also determined by social, political and economic conditions; thus, it should be identified in relation to existing social and political structures¹⁰. In this regard, the approaches towards history education in Britain cannot be fully understood without reference to the social and political context of the period. The years between late 19th and early 20th century, can be identified in Hobsbawm's words, as «the age of empire». The distinguishing feature of the period was the rise of new colonial empires and the division of the world among them. For these countries, having a colony was a status symbol irrespective of its economic value. Britain, as a leading empire, expanded its territories to four million kilometer squares in this period and thus, regarded itself quite prestigious and unique¹¹. London was able to establish its hegemony on the political, economic and financial structures of the world system during the «long 19th century» and would maintain its hegemony until the end of the world wars of the 20th century¹². When the prestigious Cambridge history professor, J. R. Seeley, published his famous book *The Expansion of England* in 1883, Great Britain was at the peak of its power and seeking the answer to the question of how to maintain this empire. At that time *The Expansion of England* based on a series of Seeley's lectures given to his undergraduate students in 1881-1882, became the basic textbook of the British imperialist canon¹³. It can be said that there was no imperial optic in British historiography until Seeley and according to him, British historiography remained uninterested in two critical issues; the foundation of a Greater Britain and that it had «conquered and peopled half the world». Henceforward, historians should have focused on these issues related with being an empire¹⁴.

That is to say, construction of «Britishness» in the new generation through history courses is closely related with Britain being an imperial and post imperial power¹⁵. It can be argued that the emphasis on empire was an effective mortar for the justification of the system in Britain. The annual celebration of Empire Day, beginning in 1902 with the death of Queen Victoria and turning into an official ceremony in the schools in the following years, is evaluated as

¹⁰ K. İnal, *Eğitim ve İktidar: Türkiye'de Ders Kitaplarında Demokratik ve Milliyetçi Değerler*, Ankara, Ütopya, 2004, pp. 12, 39.

¹¹ E. Hobsbawm, *İmparatorluk Çağı 1875-1914* [The Age of Empire 1875-1914], Turk. transl. V. Aslan, Ankara, Dost, 2005, pp. 70, 79.

¹² During the long 19th century, London dominated political, social and financial structures of the world. It would continue its domination until the end of world wars of the 20th century. R. Boztemur, *Avrupa'nın Uzun Ondokuzuncu Yüzyılı*, «Doğu-Batı», vol. 4, 2001, p. 73.

¹³ R. Callahan, *Review: The Expansion of England. By J. R. Seeley*, «Journal of the American Oriental Society», vol. 93, n. 3, 1973, p. 393.

¹⁴ J. R. Seeley, *The Expansion of England*, London, Macmillan, 1914, pp. 8-10.

¹⁵ S. Marks, *History, the Nation and the Empire*, «History Workshop Journal», n. 29, 1990, pp. 111-119.

institutionalization attempts to become proud of imperialism¹⁶. In this phase of capitalism, having a colony was a significant economic motive. Yet, the only motive for its political justification and social acceptance was the ideology of nationalism.

The reason for the formation of Britishness as a national identity was the formation of the British nation and United Kingdom as a political unity through society becoming more homogenous with the various local identities and languages of Britain melting together into a harmonious whole with a common culture. In fact, the period from 1707 – the year United Kingdom of Great Britain was established – to the late 19th century, marked the time during which formation of the nation was almost completed. Over time, the English, Scottish, Irish and Welsh peoples of Great Britain adopted the dominant English culture and constituted the people of Britain. Speaking Standard English, standing up and singing the national anthem *God Save the Queen* (1745), respecting the national flag *Union Jack* (1801) were the symbols and rituals associated with consolidating the new British people. There is no doubt that the old nations of the British Isles were not completely destroyed; they were reduced to second degree partners before the English¹⁷. Since then, modern history education that emerged as a part of mass education, fortified this British identity.

The Empire maintained and protected its power at home and abroad among its colonies through the educational system. This can be clearly seen in the 1901 report of the Board of Education containing information about the educational systems of the chief colonies of the British Empire. The report indicates that throughout the Empire, there has been no centralized control over educational policy and traditions can be distinctively observed in the scope and methods of instruction. Yet, the importance of a united effort in such branches of education is also emphasized in terms of its effect on the economic welfare or the collective interests of the whole Empire¹⁸. To maintain the integrity of the empire, the importance of instilling common values and accordingly the priority given to education is visible in the content of the report.

Within this political context, the dominant national discourse of British historians demonstrated the “uniqueness” and “superiority” of their own nation-state which would have great reflections on school history. Whig historians declared that the unique tradition of liberal parliamentarism was the reason for their superiority to other nations. A famous British historian, George Macaulay (1876-1962) declared that the British were «the greatest and most highly civilized people that ever the world saw»¹⁹. Hence, British society in the

¹⁶ Hobsbawm, *İmparatorluk Çağı 1875-1914* [The Age of Empire 1875-1914], cit., pp. 82-83.

¹⁷ N. Davies, *Avrupa Tarihi* [Europe: A History], Turk. Trans. ed. by, M.A.Kılıçbay, Ankara, İmge, 2011, pp. 859-860.

¹⁸ Board of Education, *Special Reports on Educational Subjects*, London, HMSO, 1901, p. V.

¹⁹ For the nationalist discourse of European and US academic historians see P.M. Kennedy,

19th century was more open to liberal thoughts compared with its European counterparts. Parliamentary and legal systems first emerged in the United Kingdom. Its institutions did not experience severe revolutionary or occupancy shocks, and the dominant attitude in political culture was pragmatism²⁰.

There were also negative perceptions about other nations inside Britain; therefore, the Scottish, Irish and Welsh were marginalized and the word England had been used as a synonym of Britain for a long time²¹. The term Britain signified England outside and this nourished the perception that the other nations were inferior and backward when compared with England. That is to say, as the only genuine culture was that of England, the other peoples of the Island should model themselves on the English. In this island being the cradle of modern nationalism, in the 19th century there were intellectuals who regarded the English as the «chosen peoples» of modern times²².

2. *Debates over the Purpose of School History*

From the beginning of the 20th century, there was a tradition of non-interference by the State in relation to what should be taught in history courses²³. The British education system was relatively decentralized and schools were free to teach their own curricula²⁴. The Local Education Authorities had control of schools in their areas, but the head teachers and their staff had great autonomy within the system²⁵. This kind of decentralized educational system was largely the outcome of the liberal, rooted and civil society tradition of Britain. In 1929, Handbook of Suggestions advised that:

The Decline of Nationalistic History in the West, 1900-1970, «Journal of Contemporary History», vol. 8, n. 1, 1973, pp. 77-100.

²⁰ Davies, *Avrupa Tarihi* [Europe: A History], cit., p. 854.

²¹ S. Berger *et al.*, *Writing National Histories*, London, Routledge, 1999, p. 10.

²² Hayes, *Nationalism: A Religion*, cit., pp. 39-41.

²³ In fact, there was no direct state control over school curricula until the 1970's. Early 20th century, English education was characterized by local diversity. Local differences in respect of social and economic structures, religious and party politics had produced significant local differences in educational provision. For detailed information about the characteristics of educational system and policies in England in 20th century, see P. Gordon *et al.*, *Education and Policy in England in the Twentieth Century*, London, Woburn Press, 1991.

²⁴ Steedman argues that this decentralization, although often interpreted as a major step towards progressive, child-centered education; was in fact established «as a bulwark against socialism, and safely entrusted the traditional curriculum to the day-to-day conservatism of local authorities and the majority of the teaching force in elementary schools». For further information, see, C. Steedman, *Battlegrounds: History in Primary Schools*, «History Workshop Journal», n. 17, 1984, pp. 102-112.

²⁵ C. Chitty, *Central Control of the School Curriculum*, «History of Education», n. 4, 1988, pp. 321-324; P. Lee, *History and National Curriculum in England*, in A. Dickinson *et al.* (edd.), *International Yearbook of History Education*, London, Routledge, 1995, pp. 73-123.

The history syllabus, even for schools in similar circumstances, may properly vary according to the capacity and interests of the teacher. It is undesirable that all schools in any particular locality should follow precisely the same syllabus. Each teacher should think out and frame his own scheme, having regard to the circumstances of his school, its rural or urban environment, its staffing and classification, and in some measure also to the books and the topics which most appeal to him²⁶.

It can be said that, for most of the 20th century, «history became a matter of historians and history teachers, both as individuals and as interest groups»²⁷. However, although teachers were autonomous in constructing and implementing history curricula; there was an inherited consensus, or what is called «great tradition», which was essentially non-controversial and accepted²⁸. In this respect, history teaching in the 20th century England was dominated by this tradition and this also existed to some extent in Wales, Northern Ireland and Scotland. Starting from 1900, the main features of this great tradition remained unchanged for nearly 70 years²⁹. This tradition was distinctive in its aims, content and methodology as elaborated below.

The content of the knowledge to be taught was clearly defined as the reflection of the great tradition in early 20th century: It was mainly a political and English history. Slater criticized this content in a lecture given in University of London in the 1980s:

Content was largely British, or rather Southern English; Celts looked in to starve, emigrate or rebel; the North to invent looms or work in mills; abroad was of interest once it was part of the Empire; foreigners were either, sensibly, allies, or, rightly, defeated... It was inherited consensus, based on largely hidden assumptions³⁰.

According to this understanding, history was not seen as a field to which students could contribute, students were seen as passive receivers in classes. What the teachers expected from their students were memorizing and restating the narrations in the exams. Among the information the students should memorize were, the past of the British nation they belonged to and the distinguishing features of this nation from the others. Yet the primary function of this course was to raise homogenous citizens as mentioned above³¹.

²⁶ Board of Education, *Handbook of Suggestions for the Consideration of Teachers and Others Concerned in the Work of Public Elementary Schools*, London, HMSO, 1929, p. 115.

²⁷ R. Aldrich, D. Dean, *The Historical Dimension*, in R. Aldrich, (ed.), *History in the National Curriculum*, London, Kogan Page, 1991, p. 99.

²⁸ R. Phillips, *Government Policies, the State and the Teaching of History*, in J. Arthur, R. Phillips (edd.), *Issues in History Teaching*, London, Routledge, 2000, pp. 10-23.

²⁹ For further information, see D. Sylvester, *Change and continuity in history teaching 1900-93*, in H. Bourdillon (ed.), *Teaching History*, London, Routledge, 2003, pp. 9-26.

³⁰ J. Slater, *The Politics of History Teaching*, London, Institute of Education, 1989, p. 1.

³¹ İ. Tekeli, *Birlikte Yazılan ve Öğrenilen Bir Tarihe Doğru*, İstanbul, Tarih Vakfı Yurt, 2007, pp. 102-103.

3. *History as Moral Training*

Traces of the great tradition can be easily observed in the publications produced by the government from 1900 onwards. Within this scope, history was largely seen as an instrument of moral training. In 1905, the Board of Education acknowledged that all children had certain rights and duties and through the history courses, they would learn how these rights and duties arose. It also accepted that although the teaching of history had some difficulties, it was a subject of great importance since it showed students the positive and negative experiences of historical personalities: «A further and most important reason for teaching history is that it is, to a certain extent, a record of the influence for good or for evil exercised by great personalities. No one would dispute that our scholars should have examples put before them, whether for imitation or the reverse, of the great men and women that have lived in the past»³² The 1927 Board of Education Handbook of Suggestions also affirmed that the «history syllabus should be built round the stories of the great men and women of the past»³³.

It was not just official records, but also experts in history education that regarded history as a tool for teaching moral values to students. Landale, who wrote several articles on history teaching in the *Practical Teacher*, considered the weakest point of modern education to be its deficiency in moral training. She suggested using stories from the lives of heroes in the classroom and presenting them in a concrete form so that children would understand better certain values like «truth», «honor», «courage» and «constancy». Her moralistic optic was perfectly consistent with monarchist and aristocratic mental past of Britain.

Accustomed by this means to join in admiring the best and noblest characters in history, they will gradually come to form a high standard of moral excellence, so that when they begin to acquire the inevitable knowledge of evil which comes to them from the experience of life as well as from history, their moral sense does not suffer as it might otherwise do, because evil is at once recognized as such from its contrast to the heroic goodness they have been accustomed to contemplate³⁴.

While it was common to see history education as a means of inculcating moral values and in this sense, the lives of great men were mainly used as illustrations, there were also some opposition to this understanding. For instance, White complained about a great deal of school history consisting of the lives of sovereigns rather than the lives of ordinary people and suggested that famous people were also moved by ordinary feelings and circumstances

³² Board of Education, *Suggestions for the Consideration of Teachers and Others Concerned in the Work of Public Elementary Schools*, London, HMSO, 1905, p. 61.

³³ Board of Education, *General Report on the Teaching of History in London Elementary Schools*, London, HMSO, 1927, p. 15.

³⁴ I. Landale, *How to Teach History*, «Practical Teacher», April 1885, p. 58.

since they thought and talked as we do. Thus, if we gave pupils the opportunity to examine lives of ordinary people, history would become more real than narrating the actions of the King and Parliament. Consequently, the main aim of history teaching was to «give ideals to the pupils by the depicting of men and women who are not far removed from ourselves [...] In history the people *did* live, the deeds *were* done, and therefore there is always the encouragement that ‘what man has done, man may do’»³⁵.

The great tradition which had significant influence on the content of early 20th century British history teaching was also satirized in *1066 and All That* written by Walter Carruthers Sellar and Robert Julian in 1930³⁶. This humorous history book aimed to ironically state that 1066³⁷ was the only date anybody could remember. The authors’ words in their preface *History is not what you thought. It is what you can remember* summarize the main tradition of history teaching in Britain in the first quarter of the 20th century.

4. *History in Formation of an Imperial Identity*

During the early 20th century, history was the major instrument for social education. The discussion on the need for civic instruction was conducted within the context of history teaching. The conferences of the Historical Association³⁸ can give us idea clue to the dominant paradigm of the period and the associated debates on education. For instance, in a meeting on history teaching in 1911, complaints arose regarding the propaganda, which distorted the history of Britain’s past and in contemporary Europe. The social purpose of history teaching, with all its attendant moral and political dilemmas, was also presented as «by instilling the historical habit of thought, by regarding the present in the light of the past, that we can hope best to conserve the good and reform the evil in political and social organizations»³⁹. While attributing the aims of good citizenship to history education, the main emphasis was on

³⁵ E.M. White, *The Teaching of History*, «Practical Teacher», January 1908, p. 355.

³⁶ W.C. Sellar, R.J. Yeatman, *1066 and All That: A memorable History of England, comprising all the parts you can remember, including 103 Good Things, five Bad Kings, and two Genuine Dates*, London, Methuen, 1930.

³⁷ This is the year when William the Conqueror invaded England and came to throne following the Battle of Hastings, the Norman Conquest which symbolizes the initiation of the establishment of a number of institutions that made the England we know today.

³⁸ The Historical Association is a membership organization founded in England in 1906. Its basic aim was the improvement of history teaching in schools by bringing the history teachers together and supporting the study of the subject at all levels.

³⁹ R. Gilbert, *The Impotent Image: Reflections of Ideology in the Secondary School Curriculum*, London, Falmer Press, 1984, p. 14.

values such as responsibility to the state, spirit of duty, patriotism, moral truth, shaping character with appropriate attitudes.

The target period of this paper consisted of the years when the state aimed to inculcate British citizens with strong patriotic and nationalist values. These included selecting patriotic songs for school music, the activities of Boy's Brigade and the Scouts⁴⁰. The understanding of racial hierarchy as a reflection of Social Darwinism was also evident in early 20th century texts. There are numerous indicators of racial stereotypes in history and geography textbooks and the emphasis on the geographical greatness of Britain when compared with other countries⁴¹. However, fascism as a non-egalitarian ideology that had a potential of institutionalizing racism, did not become an attractive movement in Britain as experienced in continental Europe. The civil and liberal character of England's political sociology would remain through the Interwar Era.

The 1905 Handbook of Suggestions also reflected the nationalistic and superiority perceptions of the Board of Education:

From the geography lessons the scholars know that Great Britain is only one country among many others. It is, therefore, important that from the history lessons they should learn something about their nationality which distinguishes them from the people of other countries⁴².

Considering the views of early 20th century historians and educators on the aim of history, «studying history for its own sake», which is basically used to develop link between past, present and future in students' minds is commonly observed in the late 19th and early 20th century periodicals. White emphasized the value of history teaching as «it forms a connecting link with the past, and by the effects of things which have happened the deeds of our ancestors can be shown as affecting us personally»⁴³. Similarly, A.J.T asserted that the benefit of history was that it enabled students to take a comprehensive view of the past

⁴⁰ It can easily be observed in the physical culture policy that Britain pursued during the Interwar Era. Having a vital body through the melding socio-political themes such as «masculinity», «vitality» and «patriotism» was necessary to achieve an ideal citizenry. Doubtlessly, forthcoming danger of war played the major role in it. I. Zweiniger-Bargielowska, *Building a British Superman: Physical Culture in Interwar Britain*, «Journal of Contemporary History», n. 4, 2006, pp. 595-610.

⁴¹ For further information, see W. E. Marsden, «All in a Good Cause»: *Geography, History and the Politicization of the Curriculum in Nineteenth and Twentieth Century England*, «Journal of Curriculum Studies», vol. 21, n. 6, 1989, pp. 509-526. There were also many negative references to Asian and African people in history textbooks. For instance in Rudyard Kipling's textbook, Africans were described as «our new-caught, sullen peoples, half-devil and half-child». For racial characteristics in history texts and children's fiction, also see M. Sherwood, *Engendering Racism: History and History Teachers in English Schools*, «Research in African Literatures», n. 1, 1999, pp. 184-203.

⁴² Board of Education, *Suggestions for the Consideration of Teachers and Others Concerned in the Work of Public Elementary Schools*, cit., p. 61.

⁴³ White, *The Teaching of History*, cit., p. 355.

and present, and consequently form an idea of the future⁴⁴. Another instance, Jeffreys argued that history was studied in order to understand the present, which was the product of the past. The students would therefore be able to interpret their own world as a part of different culture patterns⁴⁵. In fact, this understanding of education was the product of history consciousness that belonged to post-Enlightenment modernity. This consciousness required the students to see and identify themselves in a macro time flow on the basis of a continuum. If the students did not learn about history, then they could not position themselves in the past-present-future periods of this anthropomorphic understanding of time. Eventually, they would not be able to understand what was owed to the past, and comprehend their responsibilities for the future⁴⁶. This also meant that students deprived of this kind of time perception, could not be «good citizens» in the future.

However, the periodicals rather demonstrated the importance of history rather as citizenship education, especially in terms of instilling patriotic values. Hence, in Europe, history teaching in schools was seen as indispensable for instilling consciousness of duty to the «holy patria»; also for keeping the order and gaining citizenship morality. The language of patriotism in the 20th century was monopolized under the rightist ideology and gained a pro-nationalist and pro-monarchic tone⁴⁷. In his early article, A.J.T. clearly defined the aim of education as «a bulwark to strengthen nations as well as individuals. A country that has a well-established system of education is sure to prosper in all that is conducive to national greatness»⁴⁸.

School history was considered as a tool to awaken the love of the State and inspire patriotism. Every school child was expected to learn his national history to be able to love and do his duty to his country. Commemoration ceremonies of important historic dates, flag ceremonies and the songs children were taught in schools serve as good examples of the process of constructing collective identity and citizenship consciousness. These symbols were also critical in strengthening sense of respect and loyalty to the nation since they contain strong nationalist symbols⁴⁹. In this respect, the attempt of Lord Meath, an alderman of London County Council, to provide each school with Union Jack flags and annually celebrating 24 May; the anniversary of Queen Victoria's birthday as Empire Day, is significant⁵⁰. Empire Day was not just celebrated

⁴⁴ A.J.T., *The Study of History*, «The London Reader», August 1869, p. 388.

⁴⁵ M.V.C. Jeffreys, *History in Schools: The Study of Development*, London, Pitman, 1939, pp. 21-24.

⁴⁶ Tekeli, *Birlikte Yazılan ve Öğrenilen Bir Tarihe Doğru*, cit., pp. 105-108.

⁴⁷ M. Viroli, *For Love of Country: An Essay on Patriotism and Nationalism*, New York, Oxford, 1995, pp. 156-157.

⁴⁸ A.J.T., *The Study of History*, cit., p. 388.

⁴⁹ Hobsbawm, *Introduction: Inventing Traditions*, cit., p. 4.

⁵⁰ R. Betts, *A Campaign for Patriotism on the Elementary School Curriculum: Lord Meath 1892-1916*, «History of Education Society Bulletin», n. 46, 1990, pp. 38-45.

in the homeland, but also in the public and high schools of the colonies. It had the function of «increasing the interest of pupils in the history of their own countries and strengthening their bonds to the Empire which they belong to»⁵¹. With these celebrations, the peoples of colonies were also expected to recognize the privileged position of belonging to Britain Empire.

Likewise, Abbott suggested celebrating sacred holidays in schools such as «Thanksgiving Day» in US to inspire patriotism since it brought freedom round the world. He also claimed that, neglecting the study of national traditions would cause national discord and bring about a disastrous revolution. While emphasizing the importance of civic morality, the traces of religious understanding of the 19th century can also be seen in the extract below from the *Practical Teacher*:

Every teacher would welcome the opportunity of declaring to the children, the ‘noble works’ that God has done for our nation in our days and in the old time before us, and would not omit some reference to the ‘noble works’ that are still in store for us, if we follow in His path of righteousness. Such lessons, so given, would greatly stimulate the minds of children, and might, in time, become a perceptible power working in our country for unity, and strength civic morality⁵².

It was strongly believed that, pride and interest in one’s own country and cherishing the memory of those who have done great service in the past would make a man realize his responsibilities towards his own generation⁵³. Every Englishman was expected to be proud of his country and the Empire as well:

Our conquest and government of India, for instance, is unique. To have conquered and to have ruled, on the whole with such extraordinary success, such extraordinary wisdom and such extraordinary justice, a continent containing some three hundred millions of people of conflicting characters and traditions, is a feat unparalleled in the annals of the world. What a large part the history of India would have played in the education, for instance, of the Germans, if they and not we ourselves had been the conquerors!⁵⁴

While promoting history education for civic duties, the authors emphasized the importance of combining historical knowledge with imagination and emotion. In this sense, the more knowledge could be combined with imagination and emotion, the better would the knowledge would be remembered and the more powerfully would it work in forming the character. Consequently, «the imaginative mind would transfigure history into patriotism»⁵⁵.

⁵¹ Board of Education, *Special Reports On Educational Subjects*, cit., pp. 54-55.

⁵² Rev. L. Abbott, *Civic and Moral Training in Schools*, «Practical Teacher», May 1890, p. 132.

⁵³ H.K. Marten, *The Study of History in Public Schools*, «Nineteenth Century and After: A Monthly Review», October 1905, pp. 583-599.

⁵⁴ *Ibid.*, pp. 586-587.

⁵⁵ J. Bryce, *The Teaching of Civic Duty*, «Contemporary Review», July 1893, p. 23.

In fact, the pride encouraged here belonged to *natio* rather than *patria*; also being an exclusionist emotion. Therefore, the above-mentioned rhetoric was more based upon nationalism than patriotism⁵⁶. Hence, there were assertions that Britain was superior to other countries in different aspects. Within this scope, the importance of learning the history of other nations was promoted as it would be difficult to understand certain historical periods without some knowledge of European history and how the English were different and superior in doing and thinking from others. Similarly, it was claimed that only England had preserved its national character throughout the ages⁵⁷.

However, it is well known that basic characteristic of national history consist of omitting some facts, and falsifying others. One of the falsifications frequently seen in school history is that the belief of each nation standing alone, beating off all the outer barbarians from its boundaries, and securing for itself splendid self-sufficiency. Consequently, «the average ‘educated’ citizen in every nation is governed by an idea of his own nation which is false to fact, but in obedience to which he is continually expected to act»⁵⁸.

The above-mentioned «false idea» was one of the greatest obstacles to the progress of international organization. This situation led some opposition to nationalist and imperialist approaches, which particularly arose after the First World War. An understanding of citizenship education within Universalist perspective began to emerge during the 1920s. The common effort was to establish a peaceful world that would not suffer again from war. In this period, history still continued to play an important role in citizenship education. Yet, a number of publications appeared as more positive, having internationalist form of citizenship education⁵⁹. National glorification remained one of the characteristics, but there was a reaction to jingoism and chauvinism. Various critical articles warning the readers about the possible dangers of «false patriotism» were published in important journals such as *The Schoolmaster* and *The Board Teacher* which.

Another example appeared, just after the First World War, the editorial of the *Atheneum* contained strong criticisms of the traditional historical understanding of Britain. The article supported the idea that the greatest obstacle in the development of international peace was the tradition embodied in history, since the ordinary teaching of history in every nation implied that each nation owed its finest qualities only to itself. It adequately summarized Britain’s self-perception as an isolated, exclusive nation state having occasional

⁵⁶ For a historical perspective on the difference in meaning between patriotism and nationalism, see Viroli, *For Love of Country: An Essay on Patriotism and Nationalism*, cit.

⁵⁷ Marten, *The Study of History in Public Schools*, cit.

⁵⁸ Editorial, *Traditional History*, «Atheneum», February 1919, p. 55.

⁵⁹ J.Y.Y. Wong, *Rhetoric and Educational Policies on the Use of History for Citizenship Education in England from 1880-1990*, «Education Policy Analysis Archives», n. 14, 1997, pp. 20-46.

contacts with other states merely through wars and conflicts. Due to this understanding of history taught in schools, each generation were raised within an atmosphere of xenophobia:

And after the Stuarts it is difficult to find any name in the usual English history textbook which does not imply either ignorance of anything outside England or a childish hatred of foreigners. It is not strange, then, that the gallant but simple-minded Nelson should say that it was the duty of all Englishmen to hate Frenchmen⁶⁰.

Another issue to be criticized was the use of history as a propaganda tool. In this respect, the propagandist history that arose during the war was mentioned in the writings of some authors. Among them, Hearnshaw blamed both political groups (the Union of Democratic Control and The League of Nations Union) with making history their tool and reacted to it as follows:

It would appear that no sooner has the study of history been raised to the rank of a science, than the teaching of history is to be degraded to the condition of a sectarian or partisan weapon. Better that history should be eliminated from the school curriculum altogether than that it should be prostituted to the purposes of any propaganda⁶¹.

Practical Teacher also warned its readers about the possible negative effects of instilling nationalist ideas even before the First World War. It advised the teachers to be balanced in nationalistic values and «not to let their patriotism outrun their discretion. The teaching of history must be neither parochial nor purely national»⁶². Similarly, Marvin indicated the necessity of widening the national mind and spreading «the greater consciousness of other nations which the war produced» among both school children and the adult public⁶³.

The critiques given above show a steady move away from the British-centered history curriculum, towards a European-centered approach expanding into world history. An educational pamphlet (1923) on teaching history clearly reflected the effect of internationalist standpoint by emphasizing the necessity of studying history both through national and international perspectives. It accepted that the tragic outcomes of the First World War had made people «perforce acquainted with the affairs and history of other countries as well as our own»⁶⁴. The 1944 Historical Association's pamphlet, also supported this change as follows: «Apart from the fact that England is not the whole even of Britain, English history itself cannot be understood without constant reference to events and movements elsewhere»⁶⁵.

⁶⁰ Editorial, *Traditional History*, cit., p. 54.

⁶¹ F.J.C. Hearnshaw, *History as a Means of Propaganda*, «Fortnightly Review», August 1923, p. 331.

⁶² Editorial, *The Study of History-Preparatory*, «Practical Teacher», March 1908, p. 495.

⁶³ F.S. Marvin, *Nations of To-Day*, «Bookman», January 1924, pp. 220-221.

⁶⁴ Board of Education, *Report on the Teaching of History*, London, HMSO, 1923, p. 9.

⁶⁵ R.R. Reid, S.M. Toyne, *The Planning of a History Syllabus for Schools*, London, 1944, p. 9.

After the First World War, the Historical Association agreed that it was important to emphasize imperial history and knowledge of the national past, but attention should be paid to recent European history. In 1921, History Subcommittee of the Education Committee of the League of Nations Union was established in Britain. The League of Nations Union paid attention to education and promoted it to generate peace. The League recommended certain activities such as evaluating textbooks with the aim to eliminate elements that might cause mutual hatred. Moreover, it sought to further instruction in the nature, work and ideals of the League. In this respect, the function of history teaching was determined that it should instill ideals of humanity and peace in the hearts and minds of the young, ideals of humanity and peace. British supporters of the League considered educational ideals as including patriotism but also engendering suspicion, hatred, greed and fear⁶⁶. Nonetheless, this change would not be able to be put into practice in a short time. The Report, (General Report on the Teaching of History in London Elementary Schools) which was based upon a series of inspections of Public Elementary Schools in London, showed that despite the recommendation that pupils should receive some notion of world history in due perspective, it actually had little effect. The Report also noted that «in about 25% of the syllabuses, there is some reference to the existence and to the objects of the League of Nations»⁶⁷. However, this shift was gradually reflected in the educational field slowly over a long period and history education continued in its imperialist, nationalist and patriotic aims until the end of Second World War.

Conclusion

In the years between the late 19th and early 20th centuries, there were radical changes in political, cultural and economic conditions. It was a period in modern world history in which some European states perceived the world as an imperial battleground and embarked on sharing it in line with their interests. During this «imperial age», education was viewed by Britain as the pioneer of this battleground being a prominent «ideological state apparatus» to ensure the transfer the values, aims and world views of the empire to the new generations. Yet, the success of nationalism strictly embedded into educational system could only be understood within this context.

⁶⁶ W.E. Marsden, *'Poisoned History': A Comparative Study of Nationalism, Propaganda and the Treatment of War and Peace in the Late Nineteenth and Early Twentieth-Century School Curriculum*, «History of Education», vol. 29, n. 1, 2000, pp. 29-47.

⁶⁷ Board of Education, *General Report on the Teaching of History in London Elementary Schools*, cit., p. 7.

During this period, the British Empire attempted to construct a unique imperial identity in this imperial competition by emphasizing its superiority. It also inculcated its citizens to be proud of belonging to a «ruling nation». Doubtless, the crown determined the spirit of imperial citizenship and also symbolized the United Kingdom. Within this scope, in order to bring the nation together under the banner of political unity, Britain attempted to create new traditions by using patriotic symbols and monarchic rituals. In fact, monarchical ceremonies had been held for centuries; but in this imperial age they acquired new, special meanings and functions⁶⁸. Celebrating Queen Victoria's birthday as «Empire Day» or providing each school with Union Jack flags had similar functions in terms of strengthening the national loyalty to unity.

Since it had a decentralized educational system, Britain was different from the other states, which had, to a certain degree, experienced capitalism and nationalism at a later stage. The monarchical tradition was able to convert itself to constitutional order through reconciliation, without any need to resort to revolution. It can be said that, this reconciliatory and liberal political culture was reflected on the transformation of history writing. Traditional history writing in the feudal age focused on the clergy and aristocracy, did not need any direct state intervention in order to turn into a modern social science in the capitalist age legitimizing the nationalist ideology. That is to say, the traditional historiography in Britain having a strong feudal character, did not require any state or a ministerial involvement to transform it into a nationalist feature, and could adapt itself to the nationalist requirements of the modern age in the Island just as the other institutions had. Hence, the cohesion ideology of decentralized history education was nothing but «inherited consensus». This «great tradition» functioned as an assimilationist pot transforming the Celtic peoples into Anglo-Saxons. At that point, *Englishness* became an embracing identity, which assimilated all ethnic peoples in Great Britain. In this respect, the history teacher was left to be autonomous in the classroom. It was not the state that determined the teachers' teaching activities; but the «inherited consensus», which was unquestioned throughout Britain. What the teacher did in the school was to indoctrinate this modernized tradition under the auspices of the state.

Regarding the approach to history education in the context of aims and content of school history, a parallelism can be observed to a large extent between the official views of Board of Education and the views of educators. This may well be regarded as the inherited consensus of the great tradition. Until the 1930's, history was mainly accepted as an instrument for instilling

⁶⁸ For a comprehensive analysis on Britain inventing a tradition of monarchical ceremonies and changes in their meaning in time, see D. Cannadine, *The Context, Performance and Meaning of Ritual: The British Monarchy and the 'Invention of Tradition', c. 1820-1977*, in Hobsbawm, Ranger (edd.), *The Invention of Tradition*, cit., pp. 101-164.

moral values in rather a conservative tone and thus, school history aimed to generate new citizens having strong nationalist beliefs. Within this scope, civic morality provided by history education had partly racist, rather an intensive conservative tone; hence, the language of patriotism was also conservative. As a result, school education and also the lectures given by most of the academics were replete with imperialistic and nationalistic sentiments emphasizing their racial superiority over the Celtic people within the nation and as the imperial power over the other peoples outside the nation.

On the other hand, there was a growing renouncement of chauvinism, racism and jingoism among historians and educators. This understanding influenced some educators and its reflections were also seen in their publications. In addition, the catastrophe of First World War led to a decline in nationalistic views. Consequently, the approach to history education gradually changed. Reference to European history declined while the Empire disintegrated, and «regional histories» came into prominence in the course of time. For instance, South Asia, the Moslem World, South of the Sahara, each seemed to be an individual cultural entity. By the first half of the 20th century, some historians, determined that the British Empire was not structurally unique except being geographically the largest empire, neither was European culture the only culture worth studying⁶⁹. These historians expanded their scope to European-World and socio-economic history. Skills such as historical empathy and differences in understanding were emphasized both in official documents and academic/popular publications. Furthermore, war was perceived as a crime. Certainly, peaceful values which some had tried to instill in the international system after World War I, required the revision of exclusionist and hostile discourses against other nations in history textbooks. However, peace as a dominant international value could not exist during the interwar period. Nonetheless, nationalism, as the main determinant factor in this period, was the basic obstacle that prevented the citizens from empathizing with the histories of other nations and homelands. Traditional history teaching would remain in place for many more years and the changes could not be visible until the 1970s.

The changing historical understanding in Britain had the following historical/diplomatic background; above all, the First World War led the Empire into a recession and it was unable to reproduce the earlier «World Empire». Secondly, the founding of League of Nations after the war with England being one of the pioneers of this League, were trying to protect and sustain peace in Europe. Both entering into a recession in the post-war era and the efforts to sustain peace, necessitated the democratization of historiography and history teaching. This effort required inhabitant of Britain to learn the history of extraterritorial peoples and countries. This shift brought with it the internal criticism of the

⁶⁹ P.D. Curtin, *The British Empire and Commonwealth in Recent Historiography*, «The American Historical Review», n. 1, 1959, pp. 73-74.

«great men» narration. In other words, within this age, history education as the basic tool for nationalist ideology could not limit itself to the narration of “great men and women” as existed in the previous era. In brief, it was quite understandable that in such an industrialized society having a democratic mass culture, this type of history education would not be satisfactory. The satirical criticism of the «great tradition» based upon the narration of great men history, made in 1930 by W.C. Sellar and R.J. Yeatman with the book *1066 and All That* should be evaluated within this context.

Quando Pascoli scriveva per i fanciulli

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When Pascoli wrote to the children

ABSTRACT: Giovanni Pascoli was often regarded as a poet of childhood and for childhood for his poetry of the *fanciullino* and for the importance given to childish figures in his poetry. But he has explicitly assigned to the children only a small part of his work: two anthologies of Italian literature for lower secondary schools (*Sul limitare*, 1900 and *Fior da fiore*, 1901) and some texts of narrative: *La Befana* (composed between 1897 and 1899 and remained unfinished), *La cunella* (1906) and *Pin* (1908). The contribution focuses on the last three texts, analyzed with regard to their genesis and their particular writing combining prose and poetry in a prosimetrum, and linked to the biography of the author and the evolution of his poetry.

EET/TEE KEYWORDS: Giovanni Pascoli; Poetry of the *fanciullino*; Children's Literature; XXth Century; Italy.

Nel 1912, qualche mese dopo la morte di Pascoli, usciva presso l'editore Zanichelli *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovinetti d'Italia*. Con la scelta dei testi proposti da questo florilegio, che conobbe una larga diffusione fino agli anni 1940, Maria Pascoli contribuì a fissare un «canone antologico pascoliano»¹ considerato particolarmente adatto ai ragazzi, che prenderà posto fra i «luoghi della memoria» che potranno evocare parecchie generazioni di italiani, per i quali gli anni di studio rimarranno legati a poesie come *Valentino*, *L'aquilone*, *Romagna*, *La cavalla storna*, *I due fanciulli*. L'opera di Giovanni Pascoli contribuirà a formare in Italia «l'immaginario collettivo, favorita dalla massima popolarità di certi suoi componimenti insegnati fin dalla scuola elementare a molte generazioni del

¹ Il poeta sarà sempre presente nelle antologie per le scuole medie, con Carducci e Leopardi. Cfr. C. Ossola (ed.), *Brano a brano. L'antologia d'italiano nella scuola media inferiore*, Bologna, il Mulino, 1978, pp. 144-156, 244-428.

Novecento»², tanto che si può sostenere che è stata questa «fortuna scolastica abusata, oltre che sbagliata, che ha contribuito a confondere talvolta Pascoli con un poeta *per* i fanciulli»³, provocando una pregiudizievole confusione tra poesia dell'infanzia e poesia per l'infanzia. Pascoli destinò esplicitamente solo una parte della sua opera a ragazzi e bambini, scrivendo o compilando per i giovani lettori diversi libri e testi, alcuni ad uso scolastico, altri invece di genere narrativo. A questi ultimi è dedicato il presente saggio, che si propone di indagare le modalità secondo le quali il poeta ha concepito la loro specificità in funzione del pubblico giovanile al quale intendeva rivolgersi.

1. *Dal fanciullino ai fanciulli*

Nell'avantesto di *Limpido rivo*, la sorella del poeta giustificava la necessità di compilare tale antologia spiegando che il suo illustre fratello aveva da tempo fatto dei fanciulli i propri destinatari d'elezione: «Da molto tempo Egli pensava a voi e chiedeva di poter fare cose degne di voi. Ed era suo desiderio che io raccogliessi e vi offrissi, se non tutta, in gran parte, l'opera sua poiché Egli l'aveva dedicata in modo speciale alle vostre tenere menti»⁴. Sottolineava poi l'importanza dell'anno 1897 per la genesi del sentimento dell'infanzia nel poeta, associandola ad un ricordo personale. «L'autore che io vi presento oggi con questo libretto», assicurava, «scriveva fin dal 1897 questo distico:

*Sic pueros, o sancte puer, da casta docere
Carmina, dilecta matre favente, mihi*

(O santo fanciullo, concedimi che, con la protezione della tua diletta madre, io, come te, insegni puri canti ai bambini)⁵.

La data indicata da Maria deve essere innanzitutto ricondotta ai primi testi redatti da Pascoli sulla poetica del *fanciullino*, che furono pubblicati tra il gennaio e l'aprile del 1897⁶ nella rivista fiorentina «Il Marzocco» col titolo *Pensieri sull'arte poetica* e che costituiscono la prima parziale stesura che

² A. Battistini, M. Bazzocchi, G. Ruozi, testo di presentazione della «Rivista pascoliana», nn. 24-25 (2012-2013), *Pascoli e l'immaginario degli italiani*, Convegno Internazionale di studi, Bologna 2-4 aprile 2012, p. 9.

³ Y. Gouchan, *Pascoli: dal Fanciullino ai fanciulli*, in L. Bani, Y. Gouchan, *La figura del fanciullo nell'opera di D'Annunzio, di Pascoli e dei crepuscolari*, Milano, Cisalpino, 2015, p. 126.

⁴ M. Pascoli, «Ai figli giovanetti d'Italia», *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovanetti d'Italia*, Bologna, Zanichelli, 1912, pp. V-VI.

⁵ Pascoli, «Ai figli giovanetti d'Italia», cit., p. VI.

⁶ Sul «Marzocco» apparvero quattro testi brevi alle date seguenti: 17 gennaio, 7 marzo, 21 marzo, 11 aprile 1897. Sono oggi leggibili in *Poesie e prose scelte*, a cura di Cesare Garboli, Milano, Mondadori, 2002, vol. I, pp. 1181-1898.

approderà nei primissimi anni del Novecento⁷ all'esposizione completa della teoria del *fanciullino*.

In queste pagine sono enunciati i principi essenziali dell'estetica pascoliana. A partire dal mito platonico⁸ del fanciullo che sopravvive segretamente nel cuore degli adulti, Pascoli postula l'esistenza, in ogni individuo, di un eterno *fanciullino*: una forma originaria della psiche umana, sorta di *puer* archetipico che, grazie alla sua freschezza e alla sua spontaneità, possiede la capacità di commuoversi davanti a ogni cosa e di meravigliarsi di fronte al mondo, come se lo vedesse per la prima volta. La sostanza psichica del *fanciullino* è senza mutamento, separata dalla storia e dal divenire, nella sfera immobile della contemplazione delle realtà sensibili. Nell'adulto, egli è il catalizzatore di tutte le emozioni e di tutte le estasi, che vibra davanti alle forme più segrete della natura e si entusiasma davanti alle minime manifestazioni della bellezza; nella semplicità del suo spirito, è commosso fino alle lacrime e toccato nel più profondo del cuore da cose che sfuggono alla ragione adulta. Il *fanciullino* non è quindi un soggetto, ma un punto di vista diverso, alternativo; è capace di una conoscenza intuitiva dell'ordine della rivelazione, perché «d'un tratto, senza farci scendere a uno a uno i gradini del pensiero, ci trasporta nell'abisso della verità»⁹. Diventa il modello delle percezioni e delle intuizioni più autentiche, quelle che saprà dire soltanto la poesia, perché, se lo si interroga, il *fanciullino* parla in versi. In presenza del mondo, il *fanciullino* sa descriverlo con un linguaggio «schietto e semplice», un «linguaggio nativo di fanciullo ingenuo», che si esprime con una lingua che brilla e suona ogni volta come una nuova creazione, perché egli è «l'Adamo che mette il nome a tutto ciò che vede e sente»¹⁰. Sotto il velame della sua parola si nasconde la verità segreta che viene in aiuto all'adulto, quando scopre i valori propri dell'infanzia, e trova «la poesia in ciò che lo circonda»¹¹. È quanto il poeta dice al proprio fanciullino, nel dialogo che ha avviato col suo doppio infantile («parlo spesso con lui, come esso parla alcuna volta a me»¹²), e che riprenderà, sviluppandolo, quando si rivolgerà in prima persona

⁷ I *Pensieri sull'arte poetica* nel 1903 troveranno un seguito in una versione aumentata di nove paragrafi, prima della divisione del medesimo testo in venti paragrafi nella versione definitiva del 1907, nota come *Il fanciullino* (cfr. G. Pascoli, *Il fanciullino*, Introduzione e note di Giorgio Agamben, Milano, Feltrinelli, 1996). Sulla poetica del *fanciullino*, si vedano: G. Barberi Squarotti, *Il fanciullino e la poetica pascoliana*, in *Giovanni Pascoli. Poesia e poetica, Atti del convegno di studi pascoliani San Mauro 1-3 aprile 1982*, pp. 19-56; A. Battistini, *Il mito del fanciullino nell'età del Pascoli*, «Rivista pascoliana», n. 1, 1989, pp. 9-18; A. Faeti, *Il Puer e il Fanciullino*, «Rivista pascoliana», n. 3, 1991, pp. 65-73.

⁸ Nel *Fedone* di Platone, Cebes sostiene che in ogni uomo sopravvive un fanciullino pauroso che bisogna convincere di non temere la morte.

⁹ G. Pascoli, *Pensieri sull'arte poetica*, in *Poesie e prose scelte*, cit., vol. I, p. 1189.

¹⁰ *Ibid.*, p. 1190.

¹¹ *Ibid.*, p. 1197.

¹² *Ibid.*, p. 1189.

ai fanciulli, lettori delle antologie di letteratura italiana che sta per pubblicare: *Sul limitare* (1900) et *Fior da fiore* (1901)¹³.

Entrambi i manuali appaiono come i libri «della fanciullezza propria e altrui»¹⁴, guidati dal sentimento della propria infanzia di Giovanni Pascoli; ma sono soprattutto concepiti come dei viaggi di ritorno all'età infantile, fonte della creazione poetica e tappa dell'esistenza che meglio dell'età adulta può capire un'opera fatta per amare la poesia. Nelle due prefazioni, Pascoli si rivolge personalmente ai giovani lettori coi quali vuol comunicare, e che interpella con dei «Voi» spesso ripetuti, perché li considera gli unici atti ad intendere tutti i messaggi contenuti nelle sue sillogi. Tali destinatari non sono da lui chiamati «alumni» (per la loro qualità di discenti) o «giovinetti» (per l'età adolescenziale), ma semplicemente «fanciulli», anime ingenuie che egli condurrà per mano a scoprire le gioie della poesia. La loro condizione antropologica viene indicata da Pascoli come l'«età poetica»¹⁵ per eccellenza, sinonimo non d'ignoranza ma di conoscenza intuitiva immediata e profonda. A questi allievi, lettori impliciti (in quanto *alumni* delle scuole secondarie inferiori) e lettori modello (in quanto *fanciulli*), sono dedicati i libri che devono segnare il loro primo memorabile incontro con la letteratura.

Preseguendo su questa strada, dopo *Fior da fiore* Pascoli accarezzerà anche il progetto, che annuncerà ad Angiolo Orvieto, di «fare libri di lettura per le scuole elementari, facendo «la vera prosa e la vera poesia; quella cioè che intendono i fanciulli»¹⁶. Non metterà tale idea ad esecuzione, ma scriverà invece per i ragazzi dei testi senza scopo didattico, che si presenteranno come opere di *fiction*: romanzi e novelle composti con una scrittura particolare, che riunirà prosa e poesia nello stesso racconto.

¹³ Entrambe le antologie usciranno dall'editore Remo Sandron a Palermo. Per un'analisi dei due volumi (impianto e contenuti), v.: G. Pecci, *Il Pascoli antologista e le sue relazioni col Carducci e col D'Annunzio*, in *Studi pascoliani*, Società di studi romagnoli – Comitato onoranze a G. Pascoli, Faenza, 1958, pp. 141-178; S. Simone, *Giovanni Pascoli trasgressore del modello antologico carducciano*, «Letteratura italiana contemporanea», n. 17, gennaio-aprile 1986, pp. 111-139; M. Vermicelli, *Pascoli e i fanciullini*, «Rivista pascoliana», n. 9, 1997, pp. 177-186; S. Martini, *Da Carducci antologista a Pascoli antologista*, «Studi e problemi di critica testuale», n. 66, aprile 2003, pp. 129-161; M. Colin, *Pascoli tra "alumni" e "fanciullini". Pédagogie et poétique dans ses anthologies pour les écoles*, «Transalpina», n. 10, 2007, pp. 197-207; M. Colin, *Le antologie scolastiche di letteratura italiana: "Sul limitare" e "Fior da fiore"*. *Pedagogia e poetica*, «Rivista pascoliana», nn. 24-25, 2012-2013, pp. 233-248.

¹⁴ Garboli, Premessa a *Sul limitare*, in *Poesie e prose scelte*, cit., vol. II, p. 125.

¹⁵ Si potrebbe vedere in questo termine un anticipo sull'avvertimento che Pascoli darà a proposito di ciò che bisogna intendere per «età poetica»: «Sappiate che per la poesia la giovinezza non basta: la fanciullezza ci vuole!» (*Il fanciullino*, in *Miei pensieri di varia umanità* [1903], oggi in *Poesie e prose scelte*, cit., vol. II, p. 947).

¹⁶ A. Orvieto, *Prose*, a cura di C. Pellegrini, con appendice di lettere di Pascoli, Pirandello, D'Annunzio, Capuana, Cecchi, Cardarelli, a cura di R. Fedi, Firenze, Olschki, 1979, p. 160. Corsivo nostro.

2. *La Befana*

Nei momenti in cui pubblicava in rivista i *Pensieri sull'arte poetica*, il poeta progettava di scrivere un romanzo per l'infanzia. Maria menziona la redazione, allora in corso, di «un romanzetto per ragazzi, intramezzato via via da liriche scorrevoli e facili, che [Pascoli] contava di dare all'editore Bemporad»¹⁷. Nel settembre 1897, Pascoli assicurava a Enrico Bemporad: «Stia sicuro che anch'io porrò ogni cura perché il libretto per i bimbi riesca la più bella cosa del genere»¹⁸, così come alla sorella Ida («Sto facendo un romanzo per bambini, che dedicherò a Nannina»¹⁹) ed a Ermenegildo Pistelli: «Sto facendo il mio capolavoro... un romanzo [prosa e versi] per ragazzi. Io ci frango tutto il mio cuore»²⁰. Ma malgrado l'entusiasmo fiducioso che l'autore manifestava in partenza per quest'opera («si immergeva con passione nel suo romanzetto per bimbi dal quale sperava molto profitto finanziario»²¹, testimonia Maria), la stesura andò per le lunghe e durò vari anni (dal 1896 al 1902), senza mai arrivare a termine. La nomina all'Università di Messina lo obbliga ad interrompere ciò che considerava allora come «il mio più caro sogno e lavoro: è già avanzato e contiene le più belle o meno brutte mie poesie»²². Tra il 1897 e il 1899 lavora ancora su un testo che intitola *La Befana*, vi inserisce parecchie composizioni in versi, poi lo mette in bella copia alla fine del 1899; ma malgrado le sollecitazioni ripetute di Bemporad, non manda il manoscritto all'editore. Procederà due anni dopo ad un nuovo rimaneggiamento di ciò che chiama ora «una specie di romanzetto campestre con prose e poesie, *per ragazzi e per grandi*»²³, come se avvertisse ciò che vi era di ambiguo nel suo testo quanto al destinatario. Sulla prima pagina del manoscritto aggiunge un sottotitolo, *Racconto di Giovanni Pascoli per ragazzi e per grandi ricominciato a scrivere ex integro nella vigilia di Befana MCMII*, e una premessa: «La Befana è la vecchia felicità che gli uomini aspettano sempre e che soli i ragazzi vedono, dormendo, pur che siano buoni e savi»²⁴. Ma questa terza versione rimarrà in gran parte incompiuta, e Pascoli, prendendo atto del fallimento del suo «romanzetto campestre per ragazzi e per grandi»²⁵, includerà in altre raccolte le poesie scritte per *La Befana*.

¹⁷ M. Pascoli, *Lungo la vita di Giovanni Pascoli*, a cura di Augusto Vicinelli, Milano, Mondadori, 1955, p. 530.

¹⁸ Questa lettera e le seguenti sono citate da Giovanni Capecchi nell'Introduzione e nelle note dell'edizione da noi seguita: G. Pascoli, *La Befana e altri racconti*, a cura di G. Capecchi, Roma, Salerno, 1999, p. 109.

¹⁹ *Ibid.*

²⁰ *Ibid.*

²¹ *Ibid.*, p. 549.

²² *Ibid.*, Lettera a Giuseppe Saverio Gargano del 22 dicembre 1897.

²³ *Ibid.*, p. 111. Lettera a Emma Corcos del 6 ottobre 1902. Corsivo nostro.

²⁴ G. Pascoli, *La Befana*, in Id., *La Befana e altri racconti*, cit., p. 111, d'ora in poi *La Befana*.

²⁵ Secondo Patrizia Paradisi, l'ambiguità nella definizione dei destinatari del testo sarebbe la causa di tale fallimento (cfr. P. Paradisi, *Ancora Pascoli narratore*, «Rivista pascoliana», n. 12, 2000, p. 130).

La storia di questo testo, mai pubblicato in vita, è stata ricostituita da Nadia Ebani, che ha fatto stampare nel 1989 le tre stesure conservate negli archivi di Castelvecchio²⁶: tre manoscritti designati come Redazione A (un abbozzo schematico, 1896), Redazione B (una redazione compiuta, 1897-1899) e Redazione C (un rimaneggiamento in gran parte incompleto, 1901-1902). La redazione B è stata poi pubblicata da Giovanni Capecechi in un'edizione comprensiva di tutti i «racconti» pascoliani²⁷.

Il soggetto di questo «romanzetto» di una quarantina di pagine era stato suggerito a Pascoli da una pagina della *Vita infantile e puerile lucchese* (1898) di Ildefonso Nieri, che descriveva la festa della Befana in Toscana (pagina riprodotta nella sezione «Infanzia» di *Fior da fiore*²⁸) come l'evento più gioioso dell'anno per i fanciulli: «Che salti! che strilli! che allegria per tutte le case dove c'è dei bimbettini! Questa è la festa delle feste!»²⁹. Sono gli anni in cui il poeta, che è andato a stabilirsi a Castelvecchio di Barga, scopre con entusiasmo il patrimonio folkloristico di questa provincia – la culla in cui nasceranno i *Canti di Castelvecchio* (1903) – che gli sembra corrispondere al mondo mitopoietico nel quale si confondono infanzia dell'umanità e infanzia dell'individuo. La storia comincia la sera dell'Epifania, quando un gruppetto di bambini («i befanotti») va da una casa all'altra a cantare la canzone della Befana («Viene viene la Befana,/ vien dai monti a notte fonda./ Come è stanca! La circonda/ neve, gelo e tramontana./ Viene viene la Befana»³⁰), per ricevere in dono noci e castagne. Sono seguiti da una figurina vestita di stracci che non osa domandar nulla, una «bimba selvatica» che soprannominano per derisione *la bufanella*³¹. Dopo aver reso visita al parroco, si recano da Virginia, la loro giovane maestra, che li rimanda a casa perché comincia a nevicare. Mentre la piccola mendicante si rannicchia contro il muro della casa, Virginia cade in una tristezza profonda, e ripensa alla sorellina Mariuccia che ella aveva raccolto dopo la scomparsa dei genitori, e per la quale era stata una nuova madre; ma malgrado tutte le sue cure la piccina era morta a sua volta, lasciandola inconsolabile. Si rimemora allora le tristi vicende della propria esistenza: degli eventi che ripetono fedelmente i dati biografici della tragedia familiare che aveva aperto una frattura insanabile nella vita di Pascoli. L'assassinio del padre, la morte della madre un anno dopo, i sospetti della famiglia e la vana ricerca del colpevole fanno allora irruzione nella sua mente:

Le era venuta in mente, come se i cinque anni da che era morta, fossero spariti a un tratto, la sua sorellina. Virginia aveva dieci anni quando suo padre morì, undici quando morì sua

²⁶ Cfr. N. Ebani (ed.), *La Befana. Racconto inedito «per ragazzi e per grandi»*, Verona, Fiorini, 1989.

²⁷ *Ibid.*, nota n. 19.

²⁸ Pascoli, *La Befana*, cit., pp. 74-76.

²⁹ *Ibid.*, p. 75.

³⁰ Cfr. Pascoli, *La Befana*, cit., p. 44.

³¹ Nome di un piccolo coleottero in dialetto toscano.

madre e venne al mondo la sua Maria. [...] Il babbo che poteva mantenerla bene, glielo avevano ucciso. La mamma era morta quasi subito di dolore, nel vedere apparire al mondo quella bimba senza più padre. [...] Nemmeno fargliela vedere, la sua Maria! E chi era stato? Si sussurrava di questo e di quello; ma la gente se ne era curata poco³².

Quella sera, Virginia piange disperatamente nel contemplare i vestiti e le scarpette che la piccola non aveva mai portati, e immagina la felicità che avrebbero potuto condividere se fosse vissuta. Ad un tratto sente un miagolio: è una vecchia gatta malandata che viene ad affidarle il suo gattino³³; ed aprendole la porta, Virginia crede di sentire una voce infantile e si turba: è l'ombra di Mariuccina? Alla luce della lanterna scorge la bimba mendicante nella neve, che fa entrare e che riscalda, prima di servirle la cena e di offrirle le ghiottonerie della Befana. Anch'ella si chiama Maria, ella pure viene dalla Romagna: «diceva *sci*, come la sua morticina»³⁴. Invasa dalla nostalgia e dall'emozione, Virginia ricorda il paese natio e le ragioni per le quali ha dovuto lasciarlo irrevocabilmente dopo l'uccisione del padre, con parole che ricordano i versi di *Romagna*³⁵:

Oh! la sua Romagna che amava tanto, sebbene ne avesse avuto tanto dolore! Oh! la sua Romagna che tanto desiderava, sebbene, anche potendo, non vi sarebbe tornata! Perché non rischiava essa di carezzare e baciare senza saperlo, le creature degli uccisori di suo padre? Di quel delitto, ormai lontano, non s'erano scoperti o cercati gli autori. C'era stato (essa ne aveva sentore) qualche sospetto su un popolano, complice forse secondario [...]. Gli altri autori e complici erano nell'ombra. E nell'ombra sarebbero rimasti forse per sempre. Erano corsi già 17 anni da quel giorno!³⁶

La giovane mette a letto la bambina, poi ritorna in cucina e pensa nuovamente alla sorellina scomparsa. Ma l'indomani all'alba, davanti allo spettacolo della campagna imbiancata dalla neve, il suo cuore si riempie di gioia, mentre fuori suonano le campane di Barga; gli indumenti e le scarpette che aveva preparati per la sua piccola serviranno a vestire la seconda Mariuccina, che viene a portare una nuova vita nella sua casa silenziosa.

La Befana tuttavia non si compendia in questo riassunto. La sua struttura è complessa: si tratta di un prosimetro nel quale ogni sequenza narrativa è

³² Cfr. Pascoli, *La Befana*, cit., pp. 52, 54.

³³ L'episodio immaginato da Pascoli era già stato raccontato negli stessi termini in una poesia intitolata *La gatta*, composta a Massa nel 1885 e pubblicata postuma da Maria fra le *Poesie varie* (Bologna, Zanichelli, 1912, p. 37): «Era una gatta, assai trita, e non era/ d'alcuno, e, vecchia, aveva un suo gattino./ Ora, una notte, (su per il camino/ s'ingolfava e rombava la bufera)/ trassemi all'uscio il suon d'una preghiera/ e lei vidi e il suo figlio a lei vicino./ Mi spinse ella, in un dolce atto, il meschino/ tra' piedi; e sparve nella notte nera».

³⁴ *Ibid.*, p. 66. *Il morticino* è il titolo di una poesia appartenente alla sezione «Da l'alba al tramonto» nell'edizione del 1897 di *Myricae*.

³⁵ «Così più non verrò per la calura/ tra que' tuoi polverosi biancospini,/ ch'io non ritrovi nella mia verzura/ del cuculo ozioso i piccolini» (*Romagna, Myricae* 1892).

³⁶ *Ibid.*, p. 65.

accompagnata da una composizione in versi, quasi sempre «una canzone». Questo genere di scrittura ibrida – il cui primo esempio è stato il testo, a diffusione limitata, *Nelle nozze di Ida* – è tipico della prosa di Pascoli, dominata dal lirismo e strutturalmente legata alla sua produzione poetica; «per questi stessi motivi lirici», scrive Augusto Vicinelli, «egli sente spesso la necessità di passare dalla prosa ai versi»³⁷ anche in ciò che definisce egli stesso «un romanzo». Se la *Canzone della Befana* («Viene viene la Befana / vien dai monti a notte fonda»...) che i bambini cantano in apertura, è imposta dal soggetto, altre invece non hanno un vero legame sintagmatico con la narrazione, come la *Canzone del girarrosto* e la *Canzone della granata* (quegli oggetti domestici ai quali Pascoli sa dare un senso poetico) che Virginia compone e canta nella sua cucina. In seguito queste canzoni rustiche, parzialmente riscritte, prenderanno posto tra i *Canti di Castelvecchio* (1903), altre invece, intitolate *Di là, Mamma e bimba, Mai più*, saranno pubblicate postume da Maria fra le *Poesie varie* (1912) e in *Limpido rivo* (1912).

Sono delle «canzoni di lutto» quelle che Virginia canta alla sorellina defunta di cui era diventata la mamma, e non soltanto: «Oh! la sua Mariuccina cui era stata piccola madre e piccolo padre!»³⁸. Nella prima lirica (*Di là*), Virginia immagina la sorellina mentre varca la soglia del regno dei morti: «Entrasti... tra cespi d'assenzio,/ cogliendoti un *non-ti-scordar-di me...!* La porta col blando silenzio/ dell'olio t'udisti serrare su te!»³⁹, poi la rivede agonizzante, e si rimprovera amaramente «di non aver nutrita forse abbastanza, di non avere abbastanza rallegrata la sua sorellina, la sua figliolina»⁴⁰. Per Pascoli il legame affettivo fra i vivi e i morti non si allenta, perché gli uni e gli altri restano uniti in una comunione ininterrotta, e la presenza muta e pervasiva dei cari scomparsi obbliga i vivi al ricordo perpetuo, senza tregua né evasione. Virginia canta poi una seconda canzone funebre (*Mamma e bimba*), nella quale si intrecciano le domande e le risposte di un dialogo immaginario:

– Cammina, cammina
Ritorna da me!
– Ma sai tu, mamma
La strada che c'è?

– Ma, dopo, il riposo
Più dolce sarà.
– Sapessi..., io non oso,
dal buio che fa!

– Ma qui mi vedrai!

³⁷ Vicinelli, «La prosa del Pascoli», *Studi pascoliani*, cit., p. 235. V. anche F. Del Beccaro, «Pascoli narratore», in F. Livi (ed.), *Studi pascoliani*, Lucca, Maria Pacini Fazzi, 1993, pp. 157-168.

³⁸ Cfr. Pascoli, *La Befana*, cit., p. 52.

³⁹ *Ibid.*

⁴⁰ *Ibid.*, p. 54.

Ma qui ti vedrò!

– Sul petto, non sai
che peso ci ho!

– E i piedi, ancor essi...

Io non ce li ho più.

I vermi, sapessi,
che sono quaggiù!⁴¹

Nel lamento della bimba morta, il poeta aggiunge una nota macabra con quell'ultimo particolare fisico, che «assume l'aspetto crudamente funebre del corpo che si disfà sotto l'azione della decomposizione naturale»⁴². E il *tic tac* dell'orologio sembra confermare la scomparsa definitiva della sorellina, che non tornerà più: «La pendola batte/ nel cuor della casa./ Ho l'anima invasa/ dal tempo che fu./ La pendola batte,/ ribatte./ Mai più... mai più...»⁴³ (*Mai più*).

Occorre dunque rinunciare alla piccina tanto amata e sostituirla con quest'ultima venuta. Una nuova vita meno triste sembra cominciare infine quando il giorno s'alza nella casa allietata dalla presenza della *bufanella*, mentre Virginia spazza con lena cantando allegramente la lunga *Canzone della granata*: «Ricordi quand'eri saggina/ coi fragili chicchi, che il vento/ scoteva com'una manina/ sonagli graniti d'argento?»⁴⁴. Ma lo sguardo della giovane si posa allora sul tavolo della cucina dove si trovano ancora le stoviglie della cena, ed ella ricorda che la notte, i morti vengono a sedersi intorno ai tavoli che non sono stati sparecchiati. E l'ultima sequenza⁴⁵ vede il ritorno del tema funebre, quando Virginia ha la visione dei defunti familiari che, poiché non intendono separarsi dai vivi, tornano di notte intorno al tavolo e piangono:

[...] Oh!... rimase la fina
tovaglia. Ed entrarono i morti.
Restò la tovaglia di rensa
sul desco e la lampada sola.
E i morti sederono a mensa
con qualche soave parola.
Poi bevvero, ognuno, per ore,
sue lagrime, la fronte reclina⁴⁶.

⁴¹ *Ibid.*, p. 56.

⁴² Gouchan, *Pascoli: dal Fanciullino ai fanciulli*, cit., p. 170.

⁴³ Cfr. Pascoli, *La Befana*, cit., p. 72.

⁴⁴ *Ibid.*, p. 78.

⁴⁵ La stesura del 1897-1899 termina con un finale «aperto». Il seguito, abbozzato nel 1902 nel manoscritto C, è drammatico e non comporta nessun *happy end*: «Virginia è molto combattuta per aver accolto in casa la bambina e s'ammala. Mariuccina va a rubare per procurare il cibo a Virginia e le dice che sono regali dei compaesani, finché non viene scoperta. Vanno via dal paese» (*ibid.*, nota di G. Capecchi, p. 112).

⁴⁶ *Ibid.*, p. 81. Questi versi saranno ripresi ne *La tovaglia* (*Canti di Castelvecchio*).

La presenza costante della mitologia mortuaria pascoliana sparge un'atmosfera di lutto sulla *Befana*, e dà un tono doloroso, se non macabro, a questo lungo racconto dove lo spazio domestico sembra confinare con quello del cimitero. Un tono che dev'essere messo in parallelo con la terza edizione (1897) di *Myricae*, contemporanea di questa narrazione, dove il motivo funebre si trova singolarmente rinforzato dalla moltiplicazione delle figure di bimbi morti e di orfanelli patetici nella sezione «Creature», dalla dilatazione della sezione «Tristezze», e da altre poesie aggiunte qua e là, come *Il morticino*, *La notte dei morti*, *I due cugini*, *X agosto*, *Il rosicchiolo*, *Vagito*. «L'effetto più evidente di questa crescita e dislocazione dei componimenti», scrive Carla Chiummo, «è che il tono complessivo della raccolta diventa ben più cupo e tragico»⁴⁷. In quegli stessi anni, la dimensione autobiografica del testo che sottolinea l'identificazione di Pascoli con Virginia, il suo doppio, non si limita al trauma dell'assassinio del padre e degli altri lutti familiari che hanno segnato l'infanzia del poeta. Il tono triste e il registro tragico della novella devono essere pure imputati alla profonda crisi attraversata da Giovanni in occasione del matrimonio della sorella Ida, che lasciò nel settembre 1895 la casa di Massa dove abitava con lui e con Maria. Pascoli, che nutriva per le sorelle minori – «le [sue] due piccine» di cui si sentiva fratello e padre: «A me pareva d'aver due figlie», scriveva *Nelle nozze di Ida*, «io vedeva le mie due giovinette figlie lavorare per me; beato, io lavorava per loro»⁴⁸ – una passione ardente e possessiva⁴⁹, aveva una predilezione per Ida. Ida «la Reginella»⁵⁰ regnava da massaia sul gruppo fraterno ricostituito, sotto lo sguardo benevolo della madre defunta, «la quale *di là* veniva a vederci [...], che godeva certo nel vedere il suo *Giovanni* tra le sue due piccole»⁵¹. La pendola ricorda col suo *tic tac* l'ineluttabile separazione dalla sorellina, ma Virginia continua a supplicare: «Un bacio! nemmeno:/ vederti soltanto!/ sentire al tuo pianto/ che m'ami anche tu!/ udirtelo almeno! nemmeno!/ mai più... mai più»⁵². Il personaggio di Virginia, come si è detto, è una proiezione autobiografica di Pascoli, inconsolabile di fronte alla separazione da Ida, che manda in rovina il

⁴⁷ C. Chiummo, *Guida alla lettura di «Myricae» di Pascoli*, Roma-Bari, Laterza, 2014, p. 62.

⁴⁸ G. Pascoli, *Nelle nozze di Ida*, in Pascoli, «Ai figli giovanetti d'Italia», *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovanetti d'Italia*, cit., p. 37.

⁴⁹ Zanzotto parla d'«incesto bianco» (*Infanzie, poesie, scuolella*, «Strumenti critici», febbraio 1973, p. 62). V., oltre alla biografia di Maria Pascoli: M. Biagini, *Il poeta solitario. Vita di Giovanni Pascoli*, Milano, Corticelli, 1955; G.L. Ruggio, *Giovanni Pascoli. Tutto il racconto della vita tormentata di un grande poeta*, Milano, Simonelli, 1998; M. Castoldi, *Pascoli*, Bologna, il Mulino, 2011. Per un'interpretazione psicanalitica, v. E. Gioanola, *Giovanni Pascoli. Sentimenti filiali di un parricida*, Milano, Jaca Book, 2000; V. Andreoli, *I segreti di casa Pascoli. Il poeta e lo psichiatra*, Milano, Rizzoli, 2006.

⁵⁰ «Tu eri la maggiore, Ida e avevi il mazzo delle chiavi: eri la massaia, eri la Reginella» (Pascoli, «Nelle nozze di Ida», cit., p. 37). Per una minuziosa ricostituzione delle ripercussioni del matrimonio di Ida nell'opera di Pascoli, cfr. Y. Gouchan, *La figure poétique d'Ida dans l'œuvre de Pascoli*, «Transalpina», n. 10, 2007, pp. 235-252.

⁵¹ *Ibid.*

⁵² Cfr. Pascoli, *La Befana*, cit., p. 72.

suo sogno del «nido» familiare ricreato: «i protagonisti del dialogo», commenta Giovanni Capecchi, «devono essere Virginia e la sorellina scomparsa e quindi, per traslato, il poeta stesso e la sorella Ida che, andandosene di casa, è come morta»⁵³. Pascoli dovrà accontentarsi di un nucleo familiare ridotto a sé stesso e alla sorella più giovane, Maria; Maria che, come la *bufinella* dello stesso nome prende il posto della sorellina di Virginia nella *Befana*, dovrà sostituire Ida presso il fratello Giovanni.

Pascoli ha dunque trasformato la festa gioiosa descritta da Nieri in veglia funebre. Se gli si fosse obiettato che la storia di dolore, di morte e di lutto raccontata da *La Befana* non era la più adatta per dei fanciulli, avrebbe senz'altro espresso il suo disaccordo, perché secondo la teoria del *fanciullino* «nulla è più proprio della fanciullezza della nostra anima che la contemplazione dell'invisibile [...], il conversare e piangere e sdegnarsi coi morti»⁵⁴. Ai critici che gli rimproveravano l'onnipresenza del tema mortuario nella sua poesia, opponeva la necessità antropologica di tale presenza: «Troppo? Troppa questa morte? Ma la vita, senza il pensiero della morte, senza, cioè, religione, senza quello che ci distingue dalle bestie, è un delirio, o intermittente o continuo, o stolido o tragico»⁵⁵. L'educazione del fanciullo all'accettazione della morte è insita nella condizione umana, e per Pascoli, «quel tipo di educazione doveva necessariamente essere compito del poeta»⁵⁶. Perciò non esiterà a riprendere il motivo funebre e i patetici «morticini» di *Myrica* quando vorrà scrivere di nuovo un testo per i fanciulli.

3. *La cunella*

Nel 1906, Luigi Bertelli *alias* Vamba fondava a Firenze, per conto dell'editore Enrico Bemporad, un nuovo settimanale per i ragazzi: «Il Giornalino della Domenica»⁵⁷. Volendo fare di questa pubblicazione la più bella rivista per l'infanzia d'Italia, egli sollecitò «gli scrittori e le scrittrici che più godono meritata fama nel pubblico italiano, e che vollero con squisita bontà promettermi il loro

⁵³ Nota 54 di Giovanni Capecchi a *La Befana*, cit., p. 116.

⁵⁴ S. Chimenz, *Giovanni Pascoli e il "fanciullino"*, «Nuova Antologia», novembre-dicembre 1933, p. 261.

⁵⁵ Dalla prefazione dei *Canti di Castelvecchio* (*Poesie*, Milano, Mondadori, 1969, vol. II, p. 499).

⁵⁶ A. Zazzaroni, *La scuola di Pascoli: fanciulli, maestri e poeti*, «Rivista pascoliana», n. 27, 2015, p. 85.

⁵⁷ Sul «Giornalino della Domenica», cfr. C. Gallo, *Vita, morte, miracoli e resurrezione del «Giornalino della Domenica», da Bemporad a Mondadori (1906-1927)*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra otto e novecento*, Milano, FrancoAngeli, 2004, pp. 317-338; M. Colin, *L'âge d'or de la littérature d'enfance et de jeunesse italienne. Des origines au fascisme*, Presses Universitaires de Caen, 2005, pp. 283-306; P. Pallottino (ed.), *L'irripetibile stagione de 'Il Giornalino della Domenica'*, Bologna, Bononia University Press, 2008.

valido aiuto»⁵⁸. Fra questi era stato chiamato a partecipare Giovanni Pascoli. Quando uscì il primo numero del giornale, la risposta favorevole del poeta fu pubblicata in prima pagina: «Metta pure il mio nome fra i collaboratori del 'Giornalino della Domenica'. E non per mostra: voglio collaborare sul serio»⁵⁹. Di fatto, nel mese d'agosto Pascoli mandò un manoscritto a Vamba, che gli rispose annunciandogli la pubblicazione imminente di «un numero speciale del «Giornalino della Domenica», tutto illustrato a colori, nel quale accogliere il meno indegnamente possibile questo mirabile gioiello ch'Ella ha voluto donare a' miei piccoli lettori»⁶⁰, e il 2 dicembre *La cunella* usciva in questo numero speciale in tricromia con le illustrazioni di Plinio Lomellini⁶¹.

La cunella fu poi inserita da Maria in *Limpido rivo*, accompagnata da una nota dove veniva da lei presentata come «una novellina ispirata dagli usi di queste montagne toscane»⁶². Come nella *Befana*, il racconto situa la storia nella Garfagnana, ma qui la trama non è riconducibile alle tradizioni popolari. Come per i *Canti di Castelvecchio*, è la lingua che porta le impronte dell'origine regionale, perché contiene parecchie voci dialettali difficilmente comprensibili senza l'aiuto di un lessico, come quello che il poeta aveva aggiunto alla seconda edizione dei *Canti* per i lettori non toscani⁶³. Ma Pascoli, che crede all'importanza della preservazione dei dialetti, considera che essi sono autenticamente legati al mondo contadino messo in scena nella novellina, e non sembra preoccuparsi della loro «leggibilità» per i giovani lettori delle altre regioni d'Italia. Del resto aveva già inserito in *Fior da fiore* molte pagine sulla vita quotidiana dei contadini toscani infarcite di termini dialettali, sostenendo che leggendole, «il giovinetto [...] imparerà tutte quelle parole così particolari e vivaci»⁶⁴ che possiedono lo straordinario potere di vivificare la lingua italiana.

Le protagoniste de *La cunella* sono «due donne di monte, una sposa giovane, una vecchia vedova; e questa non aveva più nessuno e quella stava per avere il suo primo»⁶⁵; la vecchia invidia la felicità della più giovane, che sembra ancora ignorare il dolore. La novellina si articola sull'opposizione tra

⁵⁸ *Ibid.*, p. 284.

⁵⁹ G. Capecchi, «Introduzione» a Id., *La Befana e altri racconti*, cit., p. 16. Sui rapporti tra Pascoli e il «Giornalino della Domenica», v. dello stesso Capecchi: *Voci dal «nido» infranto. Studi e documenti pascoliani*, Firenze, Le Lettere, 2011, pp. 96-99.

⁶⁰ *Ibid.*, p. 120.

⁶¹ Le pagine originali illustrate di *La cunella* e *Pin* sono riprodotte in L. Nissim Rossi (ed.), *Le grandi firme del Giornalino della Domenica*, Firenze, Bemporad-Marzocco, 1959.

⁶² Pascoli, «Ai figli giovanetti d'Italia», *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovinetti d'Italia*, cit., p. 112.

⁶³ «Ci sono parole che mal s'intendono. È vero. Sono, in vero, proprie dell'agricoltore, sono vive ancora, dopo tanti secoli, su queste appartate montagne; e chi in queste montagne non è stato, crede che siano parole morte, risuscitate per far rimanere male lui [...]. I miei contadini e montanini parlano a quel modo» («Lista di parole che posso supporre ignote a questo o quello de' miei lettori», pp. 703-710 nell'edizione Mondadori citata).

⁶⁴ Pascoli, *Fior da fiore*, cit., p. XII.

⁶⁵ G. Pascoli, *La cunella*, in Id., *La befana e altri racconti*, cit., p. 82 (abbreviato in *La cunella*).

le due donne. Da una parte, «questa vecchia garrula, che [...] non pensa che ai quattrini, un'ennesima personificazione dell'anima in cui il gravame del peccato ha inaridito la voce del fanciullino»⁶⁶; dall'altra, la giovane sposa, figura complementare della vedova, «uno di quegli sdoppiamenti così caratteristici dell'allegoria pascoliana», commenta Maurizio Perugi. «Per di più, la fissione ha qui un significato cronologico, alla sposa muore il figlio così com'era morto alla vedova»⁶⁷. Le due donne si incontrano tutti i giorni ad una fonte dove vengono ad attingere l'acqua, quando un bel giorno la giovane, prossima al parto, domanda alla vecchia di venderle la sua culla. Dopo che la vedova l'ha ritrovata tra le sue cianfrusaglie, s'intende col marito della futura madre su un pagamento dilazionato. La vecchia poi si recherà spesso alla casa della giovane coppia per incassare la totalità della somma promessa, ma ogni volta rimarrà davanti alla porta senza farsi vedere, ed ascolterà, brontolando contro i coniugi debitori, la giovane madre cantare delle ninnenanne al figlio lattante. L'inverno finisce senza che abbia luogo il pagamento promesso. In primavera, la vecchia si avvia per la stessa strada, ma nell'arrivare sente piangere la giovane madre, capisce che il bimbo è malato e se ne va di nuovo. Ma quando si ritrova senza un soldo, ritorna ancora alla capanna, spalanca la porta e reclama quanto le è dovuto con aria decisa. A questa richiesta, la giovane, infuriata, l'accusa di aver gettato il malocchio al suo piccino, e dopo aver buttato per aria lenzuola e coperte, respinge verso di lei la culla vuota gridando: «Prendila, strega, la tua cunella che fa morire i bimbi!»⁶⁸. La collera della vecchia svanisce allora, e le due donne, riunite nello stesso dolore, cadono nelle braccia l'una dell'altra. La loro riconciliazione segna la fine della novellina: «La madre singhiozzò disperatamente. E l'altra l'accarezzò, l'abbracciò, la baciò, le asciugò gli occhi col suo pannello, le disse tante paroline buone, la ninnò, la consolò»⁶⁹.

Come *La Befana*, *La cunella* è un prosimetro, il modello narrativo più adatto alla sensibilità del poeta, che insisteva sull'importanza delle parti in versi scrivendo a Vamba: «Vorrei più distinte le poesie; perché nella mia idea [...] hanno più importanza del racconto»⁷⁰. Quattro composizioni rimaste sono incluse nel testo: la canzone della fonte perenne, che cola portando la vita a tutto quanto la circonda, e le tre ninnenanne che la giovane mamma canta al suo bambino: «Il cielo ha fatto una stella!/ ninna in su, ninna in giù»⁷¹, «Dolce sonno, vieni a cavallo! Fino al canto, resta, del gallo/ nanna oh!»⁷²,

⁶⁶ M. Perugi, «Premessa» a *La cunella*, in Giovanni Pascoli, *Opere*, Napoli, Ricciardi, 1981, vol. II, p. 2016.

⁶⁷ *Ibid.*, p. 2017.

⁶⁸ *Ibid.*, p. 92.

⁶⁹ *Ibid.*, p. 93.

⁷⁰ Lettera di Pascoli a Vamba del 16 settembre 1906, in A. Ascenzi, M. Di Felice, R. Tumino (edd.), «Santa Giovinezza!». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica Edizioni, 2008, p. 320.

⁷¹ *La cunella*, pp. 86-87.

⁷² *Ibid.*, pp. 88-89.

et «Che ti senti caro figlio!/ Poverino, non puoi dirlo!/ ninna nanna, ninna nanna»⁷³. Queste ninnenanne, per le quali Pascoli si è chiaramente ispirato alle arie popolari citate da Ildefonso Nieri, ritmano il racconto accompagnando l'esistenza e poi la morte del piccolo essere. La terza ninnananna rivela alla vecchia che la salute del bimbo declina inesorabilmente: «Dormi, o fiore,/ o fiore del mio dolore [...]/ Dormi, amore!/ amore! amore! e dolore»⁷⁴.

In questa novella di miseria e di tristezza riappare la costellazione pascoliana madre/ bambino/ morte, costellazione tipicamente myricea che riapparirà in seguito nei *Nuovi poemetti* (1909), nel racconto doloroso che Rosa⁷⁵, una giovane madre che ha appena perso il figlio neonato, farà della sua troppo breve maternità a una compagna. Questa storia di un ennesimo «morticino» tuttavia contrasta apertamente coi temi e gli obbiettivi che la letteratura giovanile del primo Novecento, dove si manifestava una spiccata dinamica in favore dell'evasione e del divertimento, proponeva allora all'infanzia⁷⁶. Nel periodo in cui la nuova scienza della psicologia stava trasformando la cultura dell'infanzia e le sensibilità degli adulti, persino il Ministero dell'Istruzione Pubblica aveva raccomandato di rispettare, nei libri di lettura, «il bisogno istintivo che [il bambino] prova di giocondità e di piacere»⁷⁷, e di evitare di rattristarlo inutilmente: «Già troppe occasioni al dolore porge la vita, ed è cosa insensata e crudele turbare l'animo sensibilissimo dei bambini col racconto e con l'immagine di cose luttuose e di sciagure fittizie»⁷⁸. Ma Pascoli, che nel fanciullo non vedeva in fondo che sé stesso, non se ne curava. Maria, che forse percepiva almeno in parte l'inadeguazione di questo racconto col pubblico infantile del «Giornalino della Domenica» – almeno per i più piccoli – così ne commenta la fine in *Limpido rivo*: – «Quella povera vecchia che borbotta fra sé, ora parole di pietà, ora parole d'ira [...] finisce all'ultimo col mangiare la polenta senza sale, vinta dalla tenerezza per la madre giovane e povera anch'essa, che ha perduto il suo piccino»⁷⁹. Aggiunge poi l'insegnamento insito nella novellina: «È sempre il dolore che ci rende umani; il dolore che non manca mai né ai giovani né ai vecchi»⁸⁰. È dunque il dolore che ha reso più umane le due donne, liberandole dal loro egoismo. Questo è il messaggio che *La cunella* doveva trasmettere ai

⁷³ *Ibid.*, pp. 90-91.

⁷⁴ *Ibid.*, p. 91.

⁷⁵ Questo episodio sarà maggiormente sviluppato ne «La Vendemmia» (*Nuovi Poemetti*, canto II).

⁷⁶ Cfr. P. Boero, C. De Luca, «Esordi del Novecento (1901-1914)», in Id., *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2009², pp. 80-146; M. Colin, *Une nouvelle littérature pour l'enfant du xx^e siècle*, in Ead., *L'âge d'or de la littérature italienne d'enfance et de jeunesse*, cit., pp. 253-281.

⁷⁷ Relazione della Commissione centrale per i libri di testo a S.E. il Ministro, «Bollettino Ufficiale Ministero Pubblica Istruzione», 14 agosto 1896, p. 1508.

⁷⁸ *Ibid.*, p. 1509.

⁷⁹ Pascoli, «Ai figli giovanetti d'Italia», *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovinetti d'Italia*, cit., p. 126.

⁸⁰ *Ibid.*, p. 127.

lettori del «Giornalino della Domenica»: quello di dimostrare che nelle dure prove che la vita ci può riservare, l'amore è l'unica consolazione concessa agli uomini in un'esistenza in balia della miseria e dalla morte.

4. *Pin*

Il 15 marzo 1908, Vamba annunciava trionfalmente ai suoi lettori: «Il Giornalino della Domenica può dare ancora ai suoi lettori la prova di esser davvero il giornalino più fortunato del mondo poiché ha avuto il dono prezioso di una novella di Giovanni Pascoli»⁸¹. Il direttore del periodico si compiaceva già all'idea dello «scoppio di schietto entusiasmo» con cui sarebbe stata applaudita dai ragazzi, «nella cui anima sa il Poeta a vicenda ricercare e far vibrare tanti delicati sentimenti di squisita umana poesia»⁸², la novella pascoliana intitolata *Pin*.

Pin, il protagonista di questo secondo racconto, è il diminutivo del nome di un ragazzino bolognese (Giuseppe Scarpis), i cui genitori erano i vicini del poeta a Bologna. A differenza delle narrazioni precedenti, i fatti si svolgono in città e non nella Garfagnana (ciò che non impedisce Pascoli di utilizzare nuovamente termini dialettali toscani). *Pin* si trova a casa, in compagnia di una serva con la quale formerà una coppia antagonista che ricorda quella de *La cunella*: da una parte un bambino vivace ma dal cuore buono, dall'altra una vecchia brontolona. È un «racconto invernale»: nevicata sulla città, e quando *Pin* apre la finestra per buttare delle briciole agli uccellini, si fa sgridare dalla vecchia serva che teme il freddo. La donna ha anche una funzione di «coscienza sociale» per *Pin*, perché lo riconduce alla realtà. Ogni volta che lo vede mentre dà da mangiare ai passerotti, gli fa un predicozzo: «I signori sono tanto buoni... coi passerotti. [...] I bimbi poveri, che non hanno nulla, che non vanno sulle finestre, che non fanno *ci e pi pi*, a loro nulla!»⁸³. *Pin* dovrebbe preoccuparsi dei poveri del vicinato: del bimbo in miseria «che batteva i denti e bubblava, domandando la limosina!»⁸⁴, dei quattro figli di una vedova morta da poco, «l'hanno portata via ier sera, con quella nevicata! Lei al camposanto; e i bimbi?»⁸⁵. E la vecchia lo sgrida: «Dei cristiani, bisogna aver compassione!»⁸⁶. *Pin*, commosso, sacrifica i suoi risparmi per venir loro in aiuto. Ma ecco che un compagno di classe viene ad avvertire il ragazzino, che fa fatica ad imparare a memoria una poesia che gli sembra incomprensibile, che la scuola è chiusa a causa della neve; *Pin* smette

⁸¹ «Il Giornalino della Domenica», vol. III, n. 11, 15 marzo 1908.

⁸² *Ibid.*

⁸³ G. Pascoli, *Pin*, in Id., *La Befana e altri racconti*, cit., p. 95.

⁸⁴ *Ibid.*

⁸⁵ *Ibid.*

⁸⁶ *Ibid.*, p. 97.

di studiare e ritrova tutto il suo buonumore per andare a giocare in cortile con gli amici. La notte dopo, mentre sogna strane avventure in un paese lontano, sente battere ai vetri; sono i passeri che non hanno più nulla da beccare, e che vengono a domandare del pane cantando dei versi: «Ci desti due bricie, ieri./ [...] È poco, due bricie, è poco! poco, Pin, poco, Pin!/[...] Dai agli altri, a noi non dai!/ Il bene non basta mai!/ no, mai, Pin! no, mai, Pin!»⁸⁷. Pin si sveglia, prende un panino in cucina e lo sbriciola sul balcone. Ai nuovi rimproveri della serva, obietta: «E che male c'è a far due cose buone, invece d'una sola? Due è più d'uno!»⁸⁸. Si accorge allora che sa a memoria la lezione che non era capace d'imparare il giorno prima, perché grazie al canto degli uccelli ne ha capito il significato: «Non basta un sol pensiero d'amore!/ una stella non basta al cielo!»⁸⁹. Sono la commozione, l'immedesimazione e l'esperienza che hanno fatto maturare Pin; e Pin-*fanciullino* «riesce a capire la poesia scritta sul libro solo passando attraverso queste fasi»⁹⁰. Segue il testo completo della poesia («A maggio non gli basta un fiore!»), che dopo la canzone degli uccellini è la seconda composizione in versi del prosimetro. Pin, che possiede l'ingenuità intatta del *puer*, si è rivelato capace di una profonda conoscenza intuitiva dell'ordine della rivelazione, come il *fanciullino*.

Maria Pascoli, che ha inserito pure questa novellina in *Limpido rivo*, spiega la ragione del brutto carattere della serva («È un po' brontolona quella vecchia serva! Ma noi dobbiamo compatirla pensando alla sua povera vita di fatiche e di stenti. I troppi disagi, talvolta, fanno diventare acri e dispettosi»⁹¹); è un essere dal cuore arido, che non capisce la poesia autentica, né il canto degli uccelli, e che, «posta di fronte alla fresca voce del fanciullino, alla fine si riduce al silenzio»⁹². Poiché è rimasto vicino alla natura originaria del *fanciullino*, Pin può servire da guida all'adulto, e dargli una lezione morale valida per tutti. Così in questo personaggio si rivela la figura del «fanciullo etico»⁹³ emblematico di una riflessione sulla condizione umana, la cui valenza permette d'intravedere la missione pedagogica che l'autore si era fissato, per la necessaria realizzazione di un ideale di pace e di giustizia sociale di tipo umanitario, dove brillava la sua compassione per gli umili e i diseredati.

Pascoli, che aveva da poco pubblicato *Odi e Inni* (1906) – uno dei cui temi è l'aspirazione alla fraternità –, si era allontanato dalla poetica del ricordo e del dolore illustrate da *La Befana* e *La cunella*. Ha trovato con *Pin* «il giusto tono» per raccontare ai fanciulli una storia vicina allo spirito del «Giornalino della

⁸⁷ *Ibid.*, pp. 99-100.

⁸⁸ *Ibid.*, p. 101.

⁸⁹ *Ibid.*

⁹⁰ Zazzaroni, *La scuola di Pascoli: fanciulli, maestri e poeti*, cit., p. 84.

⁹¹ Pascoli, «Ai figli giovanetti d'Italia», *Limpido rivo: prose e poesie di Giovanni Pascoli presentate da Maria ai figli giovanetti d'Italia*, cit., p. 17.

⁹² M. Perugi, «Premessa» a *Pin*, in Pascoli, *Opere*, cit., p. 1999.

⁹³ Per questa interpretazione della figura del fanciullo in Pascoli, cfr. Gouchan, *Pascoli: dal Fanciullino ai fanciulli*, cit., pp. 172-185.

Domenica»: una storia senza lutti né lacrime, che si vuole educativa col parlare «degli affetti familiari, della pietà per gli infelici, della fraterna eguaglianza di tutti gli uomini»⁹⁴, ma propone una morale «sorridente e bella e circonfusa di grazia e di tenerezza»⁹⁵. Malgrado però le promesse di collaborazione fatte a Vamba e a Bemporad, e malgrado il desiderio, nuovamente espresso nella sua corrispondenza, di scrivere in risposta alle loro attese «un *Libro uccellino*»⁹⁶, fu questa l'ultima novellina che Giovanni Pascoli scrisse per i ragazzi. La cattedra di letteratura italiana all'Università di Bologna, che occupava dopo Carducci, doveva condurre Pascoli ad assumere a sua volta il ruolo del «poeta vate» nazionale, piegando la sua poetica verso i temi storici ed epici delle sue ultime raccolte (*Canzoni di re Enzo*, *Poemi Italici*) dove avrebbe celebrato le glorie e le aspirazioni della patria, lungi dal *fanciullino* e dai fanciulli.

⁹⁴ Relazione della Commissione centrale per i libri di testo a S.E. il Ministro, cit., p. 1513.

⁹⁵ *Ibid.*, p. 1511.

⁹⁶ Pascoli, *Lungo la vita di Giovanni Pascoli*, cit., p. 939.

For the «patriotic and national education» of Italians abroad. The posthumous edition of the reading book *O Patria mia...* by Luigi Bertelli (Vamba) and its distribution in Brazil*

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ABSTRACT: Depending on a wealth of archival and print documentation, the article reconstructs for the first time the genesis, contents and ideological and cultural addresses, and the particular editorial fortune, recorded in and out of the peninsula by one of the best-known and long-lived reading books for the Italian schools abroad appeared between the two world wars: *O Patria mia...* «*degnà nutrice delle chiare genti*», posthumous work of the famous children's literature writer Luigi Bertelli, better known by the vast audience of his little readers with the pseudonym of Vamba. The article focuses on the original nationalistic but non-fascist approach of Vamba's work, which, after the advent of Mussolini's regime in Italy, was subjected to a sort of fascistization of the contents by the Florentine publisher Bemporad. In spite of this, the work was never loved by the regime, so that in the mid-1930s, given its large distribution, for example, in Italian schools in Brazil, it was decided to replace it with ideological and political textbooks more in line with the addresses of fascist totalitarianism.

EET/TEE KEYWORDS: Textbooks; Italian schools abroad; Vamba; Brazil; XXth Century.

* The article proposes, with extensive modifications and additions, the contribution already made in Portuguese in the Brazilian scientific journal «História da Educação», vol. XXI, n. 51, 2017.

1. *The vicissitudes of a reading book for Italian schools abroad*

Between 1922 and 1924, the Florentine publisher Enrico Bemporad gave to the prints, in a valuable three-volume edition illustrated with 250 portraits and art reproductions, the reading book for the Italian schools abroad *Patria mia... «degnà nutrice delle chiare genti»*, posthumous work by the famous children's literature writer Luigi Bertelli¹, better known by the vast audience of his little readers with the pseudonym of Vamba, who had too soon passed away – only sixty years old – a few years earlier on 27th November 1920².

Intended to meet in the 1920s and 1930s a great fortune in the Italian schools abroad, so that it was re-published a decade later³, *O Patria mia...* had had a long and particularly controversial editorial story, as evidenced by the vicissitudes which for a decade had delayed its writing and then its same publication.

A first specific reference to the genesis and characteristics of the reading book can be already found, in fact, in the letter sent by Luigi Bertelli to Enrico Bemporad on 9th July, 1913, in which the writer was largely optimistic about the times of publication:

Following today's meeting – he wrote – in which I have shown the work *O Patria mia...* it is understood that this work will be published in 3 volumes of about £. 2. Each volume may also be sold separately and I commit myself to making the appropriate suppressions, additions and modifications to that purpose, so that the 3 volumes can also form a single, organic work. I will prepare for the 1st of September the vol. I of this work, so that at this time you can immediately give it to the press. The work will be conveniently illustrated as agreed. For the 1st of September, then I will also hand at least the 1st volume of the History of the Risorgimento for the 3rd elementary class, of which I spoke in my previous letter, and I will hand the other volumes of the history course in periods to be defined. You commit yourself to print by the month of November «Storia di un naso»; and also the second volume of «Cinematografo poetico»⁴.

¹ L. Bertelli (Vamba), *O patria mia... «degnà nutrice delle chiare genti»*, 3 vols., Firenze, Bemporad, 1922-1924.

² On Luigi Bertelli's biography and works see A. Ascenzi, «Per educare la gioventù della nuova Italia». *Luigi Bertelli giornalista e scrittore per l'infanzia tra eredità risorgimentale e costruzione di una nuova coscienza etico-civile (1860-1920)*, in A. Ascenzi, M. Di Felice, R. Tumino (edd.), «Santa Gioventù!». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica Edizioni, 2008. Cfr. anche M. Barsali, *Bertelli Luigi (Vamba)*, in *Dizionario Biografico degli Italiani*, Istituto dell'Enciclopedia Italiana, Roma, 1967, vol. X, pp. 494-499. References to Vamba can be also found in some general stories of the Italian children's literature: A. Faeti, *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, Torino, Einaudi, 1973; Id., *Letteratura per l'infanzia*, Firenze, La Nuova Italia, 1977; P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 1995; R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 1997; M. Colin, *L'âge d'or de la littérature d'enfance et de jeunesse italienne*, Caen, Presse Universitaires de Caen, 2005.

³ See L. Bertelli (Vamba), *O patria mia... «degnà nutrice delle chiare genti»*, nuova edizione riveduta ed aggiornata a cura di Ettore Allodoli, Firenze, Bemporad, 1932.

⁴ Luigi Bertelli to Enrico Bemporad, Florence 9 July 1913, in Ascenzi, Di Felice, Tumino

Actually, the issue of the writing and publication of *O Patria mia...* was destined to be seriously complicated by the lively contrast between the author and the publisher in relation to the contractual proposals advanced by the latter and judged “humiliating” and completely inadequate, by Luigi Bertelli, who in a letter to Bemporad dated 12th January, 1914, stated:

You defined my attitude *unfriendly*. No: it is the attitude of a man who does not let himself be humiliated by your offerings of *modest subsidies* – and of a family father who feels the duty of not relying on his potential agreements. In your letter of the 10th of this month, the form used is kind, but the substance is the same. «We are good friends and we have to have some mutual trust». And immediately you add, «I'll give order to give you 500 lire... provided you hand the manuscript *Patria mia*». What reciprocity!... In your telegram about *Patria mia*, you invoked the contract 1914. It says exactly so: «Mr. Bertelli is obliged to give to the Bemporad Company *under conditions to be agreed*, but in any case for a sum not exceeding the 25% of the gross selling price of the copies that will be printed, the work entitled, etc». Well. My condition concerns the copies that will be printed. I establish that the 1st edition of my *Patria mia* is of 10 thousand copies and that the sum owed to me as a percentage has to be paid in instalments of £. 500 every 10 of the month beginning with January 1915. With this, as you can see, I reject your bad accusation that I am delaying my recovering because of the difficulty of having a contract. It is sufficient you simply write to me whether or not you accept my condition, which is of utmost necessity for my dignity as a man and for my family father's duties. I reserve my right to show you later that this letter, if not in its my form, at least in its content, is *very friendly*⁵.

Although the lack of economic agreement with Bemporad, however, Luigi Bertelli was already well in the process of preparing at least the first of the three volumes that should have been the work *O Patria mia...* if, after a few weeks, he made arrangements with his friend and collaborator Orazio Bacci for a great presentation of the «book for the schools abroad» that he was preparing for the authoritative and widely-known «*Patria e Colonie*», the monthly magazine published in Milan between 1912 and 1918, «under the auspices of the Dante Alighieri National Society», for Francesco Vallardi's typography⁶.

Again, however, the contractual conditions proposed by Bemporad lengthened the publication times of the reading book for Italian schools abroad, as evidenced by two letters sent by Luigi Bertelli to the Florentine publisher at the end of the 1914. In the first, dated 28th December, the writer clarified that, if a satisfactory economic agreement had been reached, he could have handed the text «*O patria mia!* reduced to the proportions of a volume for the next 10th January»⁷. In the other, sent two days later, on 30th December, Bertelli urged the publisher's declaration on a publication plan to be delivered shortly,

(edd.), «*Santa Gioventù!*». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, cit., pp. 558-559.

⁵ Luigi Bertelli to Enrico Bemporad, Florence 12 January 1914, *ibid.*, pp. 562-563.

⁶ Orazio Bacci to Luigi Bertelli, Florence 17 March 1914, *ibid.*, p. 564.

⁷ Luigi Bertelli to Enrico Bemporad, Florence 28 December 1914, *ibid.*, pp. 565-566.

suggesting that, in the absence of an overall agreement and specific contractual guarantees, he could not even guarantee the presentation of a small version of the reading book for Italian schools abroad:

At the beginning of the new year, I need you to confirm me by letter the continuation of the treatment I received in the past, continuing to pay me with £. 500 monthly on my current account, so that I can devote myself to the work I have established and others I will propose to you. Keep in mind that when I hand you all the volumes established in our 1914 contract I will give you about 15 thousand lire of work, that is:

Comic scenes. £. 1,650 –
 Weekly Chronicle £. 1,650 –
 Moving Dramas £. 1,650 –
 4 Books of History £. 4.000 –
 Garden £. 6,000
 £. 14,950

And I will have given you also the book: *O patria mia* and the *Storia del Risorgimento*, already ready in the Alfani and Venturi Typography! To these, in 1915, I can add, if you want, a subsidiary volume of knowledge for the 6th elementary class and *Una vaga farfalletta*, followed by *Ciondolino* that I hope to finish. As you can easily calculate my conditions in front of your House will be so much improved in the coming year with my satisfaction not less than yours. One thing I ask to you now: to answer or respond to me immediately, having to secure to me and my family the continuity of this joke that is called life for the New Year⁸.

In January 1915, a contract was signed with Bemporad publisher for the publication of the work, which, according to the new agreements, would have to include not three but two volumes, each of which intended to constitute «an autonomous text [...] to can be sold separately». Among the most important clauses of the contract dated 8 January 1915, there were:

1° – [...] The manuscript of this book will be delivered by the author to the company Benporad by the 10th of February 1915 conveniently revised and reduced in perfect compliance with the conditions imposed by the Ministry of Foreign Affairs. 2 ° – The book in question [ie the first volume of the work *O patria mia*...] will have to be of about three hundred pages of 16th large size print and will be illustrated by the Publishing House, but the author will be committed collaborate in the choice of historical, geographic, ecc. illustrations. 3 ° – The volume will be sold presumably for two lire and fifty for each copy but in any case the Company Bemporad reserves the right to assign the price it consider suitable [...]. 4 ° – In compensation of this sale, Bemporad is obliged to pay to Mr Bertelli Luigi the percentage of the twenty-five percent on the cover price of all the volumes actually sold [...]. 6 ° –The Bemporad Company will make a first edition of the book «O patria mia!» of five thousand five hundred copies [...]. 8°– The first edition finished, without one of the parties formally denouncing this contract, it will be fully confirmed by another edition of the same number

⁸ Luigi Bertelli to Enrico Bemporad, Florence 30 December 1914, *ibid.*, pp. 566-567.

of copies under the same conditions. 9° – Mr. Bertelli is obliged to make in the upcoming editions of the book «O patria mia!» all the modifications that might be necessary and appropriate, given the character of the book, for any political, economic, social, historical, geographical changes in Italy⁹.

At this point, however, the situation created by the Italian entry in the first world war in the following months prompted the publisher to postpone the publication of *O Patria mia...* at the stage immediately after the end of the conflict, in the conviction – largely shared by Bertelli himself – that the war for «completing the national unity» would have finished within a few months. In a letter sent to Bemporad on July 20, 1915, in this regard, the Tuscan writer announced: «I have already made some cuts, and the book can be put in composition at the end of the month, except to wait, as in the previous volume, the completion of National Unity for the last chapter»¹⁰.

Only at the end of the conflict it will be spoken of *O Patria mia...* again. In a letter to Bemporad dated 14th November, 1918, Luigi Bertelli, after making a series of new editorial proposals and urging the reprint of some texts edited in the previous phase, concluded his speech by warning the publisher «one of these days I will sent the story of the Middle Ages typewritten. By this month, the first part of that *O patria mia...* that now needs to be hastened»¹¹.

This is the last reference to the reading book for the Italian schools abroad we have, at least for what concerns the correspondence between the writer and the Florentine publisher Bemporad. In the autumn of 1919, however, in the preface to the work *Novelle lunghe per i ragazzi che non si contentano mai*, edited the following year, Bertelli hinted to the unpublished text, announcing to his little readers: «I will tell you I have also prepared another book entitled *Italia mia!* where you will read the interesting story of Michelino and his ten meters of homeland in a foreign country, something that will please you»¹².

Despite the curious mistake of the title – *Italia mia!* in place of *O patria mia...* – the recall to «Michelino» as one of the protagonists of the work, attests, without doubts, that the Tuscan writer refers to *O Patria mia...*, being «Michelino» the more lively and naughty of the three sons of the adult

⁹ A copy of the contract for the publication of the work *O Patria mia...* «*dega nutrice delle chiare genti*», dated Florence 8th January 1915, is stored in the Archivio Storico dell'Editrice Giunti di Firenze (in seguito: ASGF), Fondo Bemporad, b. 16.8.1.

¹⁰ Luigi Bertelli to Enrico Bemporad, Florence 20 July 1915, *ibid.*

¹¹ Luigi Bertelli to Enrico Bemporad, Rome 14 November 1918, in Ascenzi, Di Felice, Tumino (edd.), «*Santa Gioventù!*». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, cit., pp. 571-572.

¹² L. Bertelli (Vamba), *Novelle lunghe per i ragazzi che non si contentano mai*, 2 vols., Firenze, Bemporad, 1920, vol. I, p. IV. The reference to Vamba is in the chapter of the III volume of *O patria mia...* entitled: «Nel quale Michelino entra in possesso dei suoi dieci metri quadrati di terra italiana» (pp. 113-120).

protagonist of the book, the craftsman from Lucca Giovanni Pontini, emigrated «to the Argentine Republic, in a colony of the province of Santa Fe»¹³.

At the announcement, addressed directly to his little readers, that the writing of the new book could be said to be substantially concluded, followed, however, particularly difficult months for Luigi Bertelli: the sudden worsening of the serious illness that had manifested long ago and that had progressively weakened him physically, forced him to slow down the activity of a writer and to progressively reduce his contacts and collaborations with the Florentine publishing house¹⁴. The death, occurred, as already mentioned, on 27th November, 1920, was destined to nullify the very possibility of the publication of *O Patria mia...*

The publisher Bemporad, two years later, put pressure on the family of the disappeared Tuscan writer to acquire and print the manuscript of the work, certainly because he was influenced by the relaunch of the Italian schools abroad started in the first post-war period¹⁵ and in particular by the new orientations on reading books by Giuseppe Lombardo Radice, who was called by Giovanni Gentile to chair the Central Commission for the examination of textbooks in the framework of the school reform of 1923¹⁶.

O patria mia... was printed with the permission of the author's family and under the Ermenegildo Pistelli's direction, who under the pseudonym of *Omero Redi* had been involved since the beginning in the editorial office of the periodical «Il Giornale della Domenica» (1906-1911; 1918-1920), founded and directed by Bertelli¹⁷ himself, who had been one of its most well-known and appreciated collaborators¹⁸. However, it presented in the third and final volume, the one on the most recent Italian civil and political affairs, a series of 'integrations' and 'additions' developed by Pistelli and Ferruccio Orsi, which, in addition to moving the end *ad quem*, i.e. the final part of the narration to the

¹³ Bertelli (Vamba), *O patria mia...* «degnà nutrice delle chiare genti», cit., vol. I, pp. 6-7.

¹⁴ R. Simi, *Perché tutti sappiate*, «Il Giornalino della Domenica», vol. VIII, n. 49, 5 December 1920, p. 1.

¹⁵ See G. Floriani, *Scuole italiane all'estero. Cento anni di storia*, Roma, Armando, 1974; G. Ciampi, *Le scuole italiane all'estero*, in V. Pellegrini (ed.), *Amministrazione centrale e diplomazia italiana (1919-1943). Fonti e problemi*, Roma, Istituto Poligrafico e Zecca dello Stato, 1998, pp. 115-122; and the more recent Salvetti, *Le scuole italiane all'estero*, in P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. Arrivi*, Roma, Donzelli Editore, 2002, pp. 535-549.

¹⁶ See A. Ascenzi, R. Sani (edd.), *Il libro per la scuola tra idealismo e fascismo. L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiori (1923-1928)*, Milano, Vita e Pensiero, 2005.

¹⁷ See A. Ascenzi, *Lettere a Vamba. «Il Giornalino della Domenica» nei rapporti epistolari tra Luigi Bertelli e i suoi collaboratori*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 317-362; and Ead., «Per educare la gioventù della nuova Italia». *Luigi Bertelli giornalista e scrittore per l'infanzia tra eredità risorgimentale e costruzione di una nuova coscienza etico-civile (1860-1920)*, cit., pp. 13-43.

¹⁸ See E. Pistelli, *Le Pistole d'Omero*, Firenze, Bemporad, 1923; Id., *Eroi, uomini, ragazzi*, Firenze, Sansoni, 1927; Id., *Le memorie di Omero Redi*, edited by L. Lattes, Firenze, Bemporad, 1932.

period immediately after the march on Rome (28th October, 1922), constituted a kind of absurd and embarrassing exaltation of the fascist ideology and the new political course imposed on the country by Mussolini's regime¹⁹.

It is not a surprise, in this respect, the strong discomfort expressed in 1924 by the members of the Central Commission for the examination of textbooks, presided by Giuseppe Lombardo Radice, for Bemporad's choice to make such heavy additions and integrations to Luigi Bertelli's reading book *O patria mia...*:

Very fine and nice edition – the Lombardo Radice Commission underlined –. The illustrations are interesting and drawn, for what concerns the history of the Risorgimento, from the author's own collections. Great books of patriotic and national education for schools and popular libraries, to be spread especially in our colonies and abroad, because, in the artistic fiction in which the historical facts are framed, we are transported to a farmhouse in America and the story is told by Italian emigrants. This Italian story and this geography told by Vamba are delightful, especially the history of the Risorgimento, in which Vamba was particularly competent and for which he felt a rare ardor. Needless to say, these books were easy to read, although sometimes the encyclopedic material aggravated the writer's lighter pages. «There is only one thing to point at the publisher, having updated the third volume with the latest political events, without mentioning the name of the compiler. Vamba has died for years, nor he was equipped with a prophetic spirit to dictate the vision of the march on Rome; for the respect due to the writer and the educator, it would be desirable not to credit with his name pages which, although remarkable for the patriotic sentiment, lack realistic artistic merits²⁰».

¹⁹ Bertelli (Vamba), *O patria mia... «degnu nutrice delle chiare genti»*, cit., vol. III, pp. 365-371 (*Epilogo*). In fact, the operation carried out some time later by Bemporad in relation to another lucky text by Luigi Bertelli, *I bimbi d'Italia si chiaman Balilla. I ragazzi italiani nel Risorgimento nazionale*, was even worse in terms of ideological and political instrumentalization of the Tuscan writer's work of the. It was published in 1915, in coincidence with the Italian entry into World War I, and then reprinted in 1921, a few months after the author's death, in a second edition corrected and improved by Ermenegildo Pistelli's careful preface. During the fifteen years since the second half of the 1920s at the end of the 1930s, Vamba's work had two other editions: the one dated 1928, also entrusted to Pistelli's care, which, in addition to 'further enhancing' the volume, added a new preface to confirm the close link between the values and aspirations of the youth that animated the Risorgimento and that framed in the mass youth organizations of fascism; and the other, the fourth in order of time, edited in 1936 for the publisher Bemporad, «updated and annotated» by Aldo Valori (Vamba's old collaborator «Il Giornale della Domenica» with the pseudonym of *Ceralacca*), who did not fail to underline the 'anticipatory' character of *I bimbi d'Italia si chiaman Balilla*, and the role of true inspiration exercised by his author Luigi Bertelli in relation to the youth policy implemented after the march on Rome from Mussolini's regime. The process of posthumous fascistization, that is, of instrumental use for propagandistic and ideological purposes, as well as commercial, carried out in the 1920s and 1930s on the journalistic and literary work of Luigi Bertelli / Vamba with the complicity of the publisher Bemporad and of some close collaborators of our author, have not yet been thoroughly studied by the childhood scholars. It is interesting, however, that such a process has ended up taking a distorting effect in historiography, so as to heavily influence – like in the case of Antonio Faeti and other scholars who have followed his analysis – the judgment on the Tuscan writer and his entire production. See Faeti, *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, cit., pp. 244-245.

²⁰ Ministero della Pubblica Istruzione – Direzione Generale dell'Istruzione Elementare, *Relazioni sui libri di testo per le scuole elementari ed elenco dei libri approvati e dei libri respinti*.

2. «*Italians for the blood flowing in their veins and the idiom that covered their thoughts*»: *O patria mia... and the cult of patriotic memories in a foreign land*

As in a modern fairy tale, the beginning of *O patria mia...* has the value of temporarily interrupting the links with everyday life and dragging the reader, almost by magic, into a distant and unknown world: a world of exotic features, which, at least initially, appears suspended between reality and fantasy. As the eye shines more intensely and the hearing becomes more attentive, however, that world reveals the presence of something deeply close and familiar: the crude profile of Italy traced on an old wall and the sweet Tuscan idiom which surprisingly resounds in that strange place catapult the reader into a microcosm able to represent metaphorically, without stretches, the reality of Italian emigration abroad, the experience of multitudes of Italian workers forced by the need to abandon their land and look for luck in far-off countries:

Close your eyes, or my little reader, and give me your hand. I want, with one of those fantastic flights that sometimes keep alive our dreams, suddenly bring you to a wide, borderless, sunny, mute and serene plain like an Italian lake on a beautiful summer day. Here we are. Do you know where we are? In South America, in the Argentine Republic, in a colony of the province of Santa Fé, which has the sweetest name of human language: *Esperanza*. Look down there... A house: the only home we can see in this delightful desert, on whose land the industrious man's hand has painted large squares of different vegetation in various colors, making it an immense chessboard. Let's get closer... It's a modest, but nice-looking house. [...] Ah, look there, on the part exposed to the north wind: there is the figure of Italy drawn on the plaster... Silence!... There is someone talking to you... and speak the Italian language... and talk about Dante!²¹

In the initial part of the story, Luigi Bertelli presents the environment and the protagonists of his reading book for Italian schools abroad with rapid but effective lines, and, at the same time, lets us see the peculiar organization that he intended to provide to the work. The protagonist of *O patria mia...* is the artisan from Lucca Giovanni Pontini, «a man with a clever face framed by a thick chestnut-coloured beard, with an agile and robust appearance». Son of a sculptor and lover of art, «remained orphaned, only in the world», Giovanni continued «the fatherly art, but with little luck, though he devoted all his enthusiasm and uncommon intelligence to him». In the end, finished «the little money left by his father», he was forced to emigrate to Argentina and here he

VIII. *Relazione sui libri di testo per le nozioni varie, le scienze fisiche e naturali, l'igiene ecc. e per la grammatica. Supplemento alla relazione sui libri di storia e geografia, di aritmetica, sui libri di religione, sui libri sussidiari e sui libri di lettura*, Libreria dello Stato, Roma, January 1925. Now re-published in Ascenzi, Sani (edd.), *Il libro per la scuola tra idealismo e fascismo. L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiori (1923-1928)*, cit. pp. 308-358 (the quote is on pp. 341-342), our italic.

²¹ Bertelli (Vamba), *O patria mia...* «*degnà nutrice delle chiare genti*», cit., vol. I, pp. 1-2.

initially adapted «to sell you plaster busts and statuettes, so to have the time to find a better state there» and finally give a breakthrough to its life.

During his «wandering life as a peddler», Pontini met his fellow countrywoman Elvira, «a girl whose sweet, modest look had left a deep impression on his soul», who, «being an orphan deprived of any support, was saved in Naples, where he was born, from one of those cruel traffickers of small slaves who, by evading laws, freely practiced their shameful industry». After so many troubles, challenging «the brutality of the evil exploiter», Giovanni Pontini managed to free the young woman, forced to live as a travelling musician, from the clutches of the «cruel old man» and to marry her.

At the end of a tiring period of «wandering life» during which «Guido, their first son» was born, the spouses Pontini's condition improved because of their sacrifices and constant commitment in work: «Giovanni had the lucky chance to be employed in a large and promising farm in the province of Santa Fé» and over the course of a few years, with «the hard and intelligent work» that «good Italian family» had been able to set up home and create the conditions for a life of a modest but sure wellness. To make the family life of Giovanni and Elvira even more joyful, the arrival of two other children, Michelino and Marietta²².

After offering to his small readers, through the moving story of Giovanni and Elvira Pontini and their family an extremely realistic and effective image of the vicissitudes marking the lives of so many Italians forced to emigrate abroad, not even silencing the terrible plague of child exploitation and the real slavery of children and orphans and abandoned children, Luigi Bertelli synthesized in the vigorous and passionate patriotic ideal that animated the protagonist of the reading book *O patria mia...* the most authentic feeling that should have inspired the multitude of Italians emigrated abroad and convey their educational work towards their children:

He [Giovanni Pontini] had never forgotten of being Italian, nor he had ever ceased, even though he was forced to abandon it, to love the country! And he wanted his children to be educated in this thought and in this love, because even if they were born in a foreign country they did not cease to be Italians, Italians like their father and mother, who had given them life, Italians for the blood flowing in their veins and the idiom that covered their thoughts. And Giovanni, with all his Italian genius, described in a thousand ways to his children the distant and unknown homeland, making his in a sort of gallery of the greatest Italians²³.

Now, next to the «busts of clay» and the «portraits» he collected «in the illustrated postcards and newspapers sent from Italy by some of his good friends», what other way did John Pontini have to keep himself alive and

²² *Ibid.*, pp. 6-10.

²³ *Ibid.*, pp. 10-11.

to convey to his children the «love for the Fatherland», if not the constant recalling, «in a gentle commonality of memories and affections», the memory of the Italian greatness through the narration of its history and the biography of its best men?

The reading book *O patria mia...* was, in fact, largely composed by a series of narratives and speeches addressed by Giovanni to his three sons and centered on the great Italians' life and works and on the main events of homeland history from the Roman times to the Middle Ages and the modern times, up to the Risorgimento, the constitution of the united state and the following events that, between the eighteenth and twentieth centuries, had characterized the peninsula.

Speeches pronounced in a plain language and suitable for children, those of the protagonist of the reading book given to the prints by Luigi Bertelli, rich in anecdotes and curiosities, constantly interrupted by Guido, Michelino and Marietta's questions or speculations and divagations; capable to give the reader the warmth and liveliness of the domestic home, but also to reiterate the true centrality of paternal and family teaching for the purposes of the offspring's patriotic education:

Pontini – as Armando Michieli has effectively synthesized – is presented in a beautiful room well furnished with rustic furniture, shaping a bust of Dante in clay: so he urges the children's curiosity and answers their questions. He narrates Dante's life and something on his work that the children are mostly interested in. [...] The following night the speech is resumed: now the father briefly tells, often interrupted by his children, the main episodes of the history of Rome, referring to the most important figures of political, cultural and artistic life; refer to the Middle Ages, and comes to the Sicilian Vespers. In the following evenings he speaks of Cimabue and Giotto, travellers of the sec. XIV, Leonardo da Vinci, Leon Battista Alberti, artists of the fifteenth and sixteenth centuries; then the scholars, the poets, the travelers, the politicians: always clear illustrations of figures, short stories of episodes.

And again, with reference to the contents of the first two volumes of *O patria mia...*:

In the sec. XVI, without a clear division with the following, the philosophers Pomponazzi and Campanella, Giordano Bruno and Luther are remembered; among the writers and poets Berni, Aretino, Caro, Gambara, Stampa and Colonna. Then, the scientists (Galilei first of all, then Malpighi and Redi) and travellers. The chapter on the sixteenth century begins with historians and philosophers: Paolo Sarpi and Tommaso Campanella; then, among the poets, Marino, Tassoni and Redi, of which he transcribes some verses of the dithyramb and the sonnet «Italia Italia, o tu, cui feo la sorte». Then some hints on the Arcadia. Among the artists there are Bernini and Guido Reni, Guercino and Salvator Rosa. [...] In the 18th century philosophers and historians: first of all, Vico and Muratori; then, among the poets, Metastasio and Apostolo Zeno, and among the theatrical authors Goldoni, with brief references to the French Revolution. [...] He explains how the poetry in the eighteenth century [...] rose to a hymn of freedom; at the beginning frivolous, and gives some examples,

then strong and inciting with Parini and Foscolo. Remembered some artists from the second half of the eighteenth century, Pontini summarizes the political events of Italy from Charles VIII to the Days of Genoa with the episode of Balilla. [...] If in all the book the greatness of Italy stands out, here the most lively and dearest part for Vamba begins²⁴.

In fact, the chapters of the book on the Risorgimento and the events that led to national unification and the subsequent proclamation of capital Rome (1870) – intended to occupy a good half of the second book and about a third of the last of *O patria mia...* – were the ones in which Luigi Bertelli's patriotic sentiment and the aspiration to promote a vigorous national education among Italians abroad were most effectively manifested.

Through the stories told by Giovanni Pontini to his children in the evening, the author talked about the facts that had marked the history of Italy since the Napoleonic Age and then, after 1815, since the Restoration stage, not to mention the hopes and expectations aroused by Napoleon Bonaparte («the Italians, who had already received the ideas of freedom and equality proclaimed by the Great Revolution, naturally welcomed Napoleon with enthusiasm») and, at the same time, their complex and decisive role in the Italian cause («– Man of Genius, added John, – and the men of genius, even though they are overwhelmed by their passions, always leave a trace of goodness on their way»)²⁵.

It is not a coincidence, as he recalled, that the Napoleonic Age had seen a new generation of literate, historians, scientists and artists emerging, with a more vivid feeling of the country and its destinies:

But were there Italian stars, in the Napoleonic period? Marietta asked suddenly. – Certainly! Giovanni answered. – And I mention you eight of them: three great poets, Vincenzo Monti, Ugo Foscolo and Carlo Porta; two great historians, Carlo Botta and Pietro Colletta; a great prose writer, Pietro Giordani; a great scientist, Alessandro Volta; a great artist, Antonio Canova.

Among them, above all, Foscolo's *Sepolcri* could «shake the memory of the great ancestors in the Italians' minds and resurrect the cult of memories», creating the premise for the literature to become «patriotic and romantic, an instrument of national claim»²⁶.

In the following pages *O patria mia...*, next to the narration of the literary controversies between classicists and romantics and to the dense and passionate profiles dedicated to Manzoni and Leopardi, outlined the events related to the constitutional risings of 1820-21 and the insurrections of 1831 and 1848, in order to trace a vivid and passionate profile of Giuseppe Mazzini and the role that he had in the national Risorgimento; a portrait that ended with a true patriotic 'profession of faith' by the author:

²⁴ A. Michieli, *Vamba*, Brescia, La Scuola, 1965, pp. 163-165.

²⁵ Bertelli (Vamba), *O patria mia...* «*degna nutrice delle chiare genti*», vol. II, cit., pp. 116, 122.

²⁶ *Ibid.*, pp. 127, 134.

If the homeland is a religion and if this religion also has its saints, Giuseppe Mazzini, for virtue of sacrifice, for perseverance of faith, for the Italianity of thought, for austerity of life, he, who never lied and loved so much, always suffering, is the greatest saint we have to worship!²⁷.

No less enthusiastic and vibrant were the profiles dedicated by Luigi Bertelli to Vittorio Emanuele II, the «Gentleman King», beloved by all the people and mourned for his premature death, «with real pain in every corner of the Peninsula»²⁸; and to the other two «creators of the national Risorgimento» and the of the «Italians' liberation from the ancient servitude»: Giuseppe Garibaldi, of whom, in a series of ambitious and fascinating stories, were told the multiple attempts and acts of heroism at first in South America and then in Italy, «in which many people conspired in order to free the homeland»²⁹; and Camillo Benso Count of Cavour, capable of «a readiness, a prudence, an unparalleled audacity to be able to take from the revolution all that was useful to his design: an Italian monarchy under the dynasty of Savoia, an idea which, before his death, he sealed, wishing for Rome as its capital»³⁰.

All in all, Luigi Bertelli, in the pages of *O patria mia...*, showed a conception of the National Risorgimento and of the process of unification, particularly attentive to the role played by the democratic currents and the national-popular dimension of the process of Italian unification³¹, based on a composite pantheon of 'fathers of the fatherland', and animated by passionate gestures and glorious episodes capable of arousing the young readers' emotional engagement:

In the history of our Risorgimento – the author underlined – each of the characters consecrated to it, naturally followed the path that his special faculties indicated to him, as best suited to accomplish his mission imposed by the homeland. So, Mazzini's republican conspiracies, Vittorio Emanuele's noble ambition, Garibaldi's indomitable value, and Cavour's subtle calculations were all sacred energies that liberated Italy from the foreign yoke³².

A very positive and optimistic judgment was also given to the controversial post-union season, without failing to remember the many «painful pages» that had characterized it, but also mentioning the progress made and the steps forward for the effective growth of the economy and a greater social justice. Thus, after recalling how, «under Umberto I's reign», the country had improved its «finances» and revived its «trades», also consolidating «its unity by linking

²⁷ *Ibid.*, p. 193. Luigi Bertelli, as it is well known, had a deep faith in Mazzini's ideas and in the values of the laic tradition of the Risorgimento. See Ascenzi, «Per educare la gioventù della nuova Italia». *Luigi Bertelli giornalista e scrittore per l'infanzia tra eredità risorgimentale e costruzione di una nuova coscienza etico-civile (1860-1920)*, cit., pp. 14-17.

²⁸ Bertelli (Vamba), *O patria mia... «degnatrice delle chiare genti»*, cit., vol. III, pp. 93-99.

²⁹ *Id.*, *O patria mia... «degnatrice delle chiare genti»*, cit., vol. II, pp. 269-320.

³⁰ *Ibid.*, pp. 331-332.

³¹ Cfr. Bertelli (Vamba), *O patria mia... «degnatrice delle chiare genti»*, cit., vol. III, pp. 1-93.

³² *Id.*, *O patria mia... «degnatrice delle chiare genti»*, cit., vol. II, p. 326.

its regions with new railway lines»³³, the enormous economic potential of current Italy was reiterated and the best wishes for the future were formulated:

Italy – it was said – is essentially an agricultural country. And it is fine: in the sense that our fertile campaigns must be the subject of every care, so that they can grow in proportion to the goodness of the soil and the climate. But this does not mean that Italy, in order to progress, to become rich, should not become established in commerce and industry as well. [...] The real index of the economic power of a nation is foreign trade, because with it the country becomes established in the rest of the world and participates in the great international life. Now, foreign trade is import and export. Do you know how important Italy was in 1861, i.e. at the time of its constitution? Just twenty-five million of lire. Today, however, the value of all the imported goods has increased to... fifteen billion and seven hundred million of lire! – And the export? For forty million, in 1861, it has grown up to nine billion and three hundred million, i.e. it is increased by sixty-nine times. [...] Things have changed. Italy is again strong, free and united. [...] Of course, there is still a lot to be done in this field, but with patience, ingenuity and courage, which are our typical characteristics, we will do better of many others who have surpassed us with little effort³⁴.

And «patience, ingenuity, and courage» were the qualities that, according to Luigi Bertelli, should have continued to distinguish the many Italians forced in the decades before to leave the peninsula and to search for luck in far-off countries, whose sacrifice was not unrelated to the Italian progress:

We – Giovanni Pontini reminded – leave Italy to look for a country where less competition would oppose the free expansion of our energies; but this phenomenon of emigration, while it is beneficial, because it decreases the number of hungry and dissatisfied people in the country, does not prevent the population of Italy from growing rapidly. [...] If things continue to go this way, and especially if Italy will improve its industries, it will become increasingly rich [...] while continuing to send armies of workers to all countries around the globe³⁵.

3. «*Many pieces of Italy scattered on other continents!*»: O patria mia..., *the defense of Italian identity and the ideal of the «good emigrant»*

In the third and final volume of *O patria mia...* a series of new characters come on stage to accompany the members of Giovanni Pontini's family and give new impetus to the narration of the experiences of the Italians abroad. They are other Italian emigrants, whose different life stories and personality profiles allow Luigi Bertelli to strongly affirm the opportunity of safeguarding the «Italian identity» and to trace a kind of ideal profile of the «good emigrant».

³³ Bertelli (Vamba), *O patria mia... «degnu nutrice delle chiare genti»*, cit., vol. III, pp. 108-109.

³⁴ *Ibid.*, pp. 204-206.

³⁵ *Ibid.*, p. 226.

Alongside Marco Zirona, «an old Venetian employed in the *fazenda* and in charge of the irrigation work», whose dialectal speech fully testified the bond of unchanged affection that bound him to his native town, there were the Neapolitan Francesco Pacella called *Ciccillo*, and Silvio Pizzirone, a Sicilian «with a beautiful baritone voice». And again: Vincenzo Maretto, a Piedmontese who had «a large store of hides» and who lived with his wife Cristina and his two adolescent sons, and Maurizio Bolazzo, a Genoese merchant «who had his prosperous little company near to Maretto's one»³⁶. They were invited for lunch on a festive day by the Pontinis, they showed in the most authentic way, with their ideas and their behaviors, the love and nostalgia for the distant motherland:

Giovanni, helped by Guido and Michelin, did the honours of the house, while Elvira and Marietta were busy in the kitchen. And the effect of that bustle was shown at noon, when on the table set up in the middle of the loggia three great trays of steaming macaroni appeared, to which the guests did such a justice, that the trays returned soon to the kitchen so white and shiny, which seemed to be washed up. The same justice was did for the roasted and brown lamb that was served after, and for the half a dozen of wine bottles with which the most warm toasts were made to the distant Fatherland. Silvio Pizzirone, after the meal, began to sing the most famous patriotic hymns with his beautiful baritone voice and which gained strength from the Sicilian inflection, and *Ciccillo* accompanied him with the guitar. Elvira played with her violin a choice of pieces of Italian music. And then the vocal concert began again, and all took part in it, singing each one the most characteristic folk songs of their own country.

In conclusion, a happy table designed to celebrate the filial connection with Italy and to revive the remembrance of the far country:

And after the concert, they began to talk about Italy; and then several gunshots were shot in the air as a sign of joy. In short, what had been done and said in the day, pleased everyone so that a proposal came out: on every Sunday from now, if the Pontini family allowed it, they would all be reunited to eat there, bringing each one of course their provisions. – After working all the week in America,– they said –, “we want to go to Italy on Sunday: do you want to? – Make sure that the proposal was accepted! [...] In this way, in the nice meetings, which were repeated with greater and greater satisfaction, the conversation found every now and then new topics with great delight and utility of the boys and the workers. And how sweet and sincere poetry in these emigrants' meetings, each of which brought a lot of memories and hopes in their hearts, and represented a part of that Italy, which was their common mother, a constant inspiration of desire and regret! They were Genoese and Sicilian, Venetian and Neapolitan, Tuscan, Lombard and of Romagna, son of the mountains and son of the sea, young and old, different in customs, dialects and opinions, but all associated the sound of the word Italy with a sense of respect and adoration³⁷.

³⁶ *Ibid.*, p. 188.

³⁷ *Ibid.*, pp. 189-190, 224-225.

In the continuation of the story, Luigi Bertelli offers to his young readers' attention two other peculiar types of Italian emigrants abroad. This is the case of Padron Pietro, the Genoese haberdasher, «owner of a real emporium, or a travelling *bazaar*» filled with «ribbons, clothes, scissors, buttons and knives...», of which the author draws a profile worthy of the best *self-help* literature, i.e. capable of embodying the ideal model of the Italian keen on his work and animated by a great confidence in his own strength and by an authentic entrepreneurial spirit, who, even in a foreign land, was distinguished for his honesty and for the great humanity demonstrated towards the others, who had attracted the esteem and respect of all, as well as for the desire to improve and the inexhaustible passion for the far homeland:

That haberdasher was, of course, an Italian. A handsome man in his forties, who had *studied*, and it was told he had even a *high school* diploma. Certainly, instead of rotting, like so many others, in a boring and miserable office, in an isolated country of the Apennines, he had had the courage to emigrate to America with a few hundred lire and a lot of goodwill, and had used his intelligence and the instruction received, in business and to win everybody's affection. With his profession he would perhaps become rich; and in the meantime his wondering life did not prevent him from reading some French and Latin books and to increase his culture³⁸.

Along with Padron Pietro, the other character who stands out in the reading book *O patria mia...* is Bossi, an Italian emigrant in Argentina who, unlike his other compatriots, seems disheartened and skeptical, completely impermeable to the patriotic nostalgia and enthusiasm: «a pessimist», as he is defined by Luigi Bertelli, «although, being him so round and fat, he seems to be the happiest person of this world». And the 'pessimism' Bertelli refers to is the one Bossi shows towards the Italian progress and of the condition of many fellow countrymen emigrated all over the world. He is convinced that the situation in his country of origin is going to get worse and that the future is far from being rosy, as well as he has no doubt that the condition of those who have emigrated abroad is destined necessarily to get worse: «Half our peasants must emigrate each year because of the misery! The more people are born, the more leave: this is the truth!», he affirms, and then, with deep bitterness, adds: «Most of the emigrants do not become rich!», and indeed «Italian emigration is a picture of misery as even the greatest writers say».

Bossi's pessimistic considerations, which mirror the most ancient controversies and commonplaces on the Italian emigration abroad that the author of *O patria mia...* want to denounce, contrasted with Giovanni Pontini's effective answers³⁹, which provided a very different interpretation of the economic and

³⁸ *Ibid.*, pp. 198-199.

³⁹ «What you have, – Pontini told Bossi one day, – is a disease unfortunately very common among us, and it is called self-denigration. There are many Italians who feel a sharp pleasure in denigrating themselves, in proclaiming defects of their own country in the face of the virtues

social condition of the compatriots moved to the American continent and of the role that Italian emigration abroad had had in the past and was called to play in the near future:

The main living business broker in Buenos Ayres – the host said – was a naughty boy who fled from Italy without a penny. He became judicious, under the spur of necessity, and became... what has become. The main farmer of the Republic, the owns fifty or sixty million of lands, had only half a lira when he landed in this country. [...] It is not enough. Humble engineers became entrepreneurs of important American public works; modest merchants have created large companies costing millions and employing hundreds and thousands of almost all Italian workers. I have heard from a competent person that, if things continue so well, in a century there will be one hundred million Italians in South America, who will form the richest and most advanced class of this population.

But the realization of this peculiar variant of the American dream – Luigi Bertelli warned through the placid and debated reflections of the protagonist of *O patria mia...* – it was not only dependent on the extraordinary attitude of the Italian workers emigrated abroad to «adapt in every continent to all climates and to all physical and geographical conditions». In order for emigration to bring great and lasting benefits and to constantly improve the conditions of those who had undertaken it, it was necessary for those who lived and worked in a foreign land to fully embody the lifestyles and the patrimony that he had made the Italian population historically great. In other words, the ideal of the «good emigrant» was strongly proposed again, as it had come out through the positive testimony offered by so many and many compatriots who, forced by the need to move abroad, had been able to give the best of themselves and had managed «to keep the name of Italy high everywhere»:

The Italian – Giovanni Pontini underlined – is usually sober and inclined to the saving, which prevents him from wiping out what he can earn. She is very fond of the family, and he regularly sends them savings when he lives alone in a foreign country. It is hard working and resistant to strain, [...] he is easily satisfied, he is well-placed anywhere, and always preserving the memory of the country, can become attached to the new land where he works and earns, and be a good citizen. And I insist on these details for you, boys, because more than once you will hear or read words of scorn or contempt for the Italians, due to some strangers' envy, unable to do better than us with the right and honest arts. [...] The Italian man for his wisdom, common sense, and good natural taste overdoes all other populations living under the heaven! [...] And all over the world there are Italian workers, and they are the soberest and most laborious; wherever there are Italian merchants and professionals, they are the most honest and most valued. Entire nations owe their prosperity to Italian emigration. [...] It is a true army of workers (two or three hundred thousand a year) spreading around the world, and everywhere leaves traces and raises monuments of Italian talent⁴⁰.

of the other countries, in always establishing between Italy and the other nations humiliating comparisons» (*ibid.*, p. 266).

⁴⁰ *Ibid.*, pp. 225-232.

In the continuation of *O patria mia...*, Luigi Bertelli, almost to reiterate the necessity and the urgency of promoting a strong national conscience in the multitude of Italians emigrated abroad, spoke about the particularly important Giovanni Pontini's endeavor: that of the «Sunday School» set up by him in his house, «in which illiterate emigrants not only learned to read and write, but also to know and love the country; to love it boldly and to honor it above all things, and to have it always in heart wherever they are in the world». And the school went beautifully, so that «every Sunday, Italian emigrants, who were far away, would gladly experience the long and tiring journey to come to it, because it seemed to everyone to breathe fresh 'Italian air' in that warm house».

And the reference to the Sunday school and the patriotic education of the Italians moved to Argentina offered Bertelli the occasion to promote, on the pages of *O patria mia...*, the work and initiatives promoted by the Society Dante Alighieri for the spread of the language and the Italian culture abroad⁴¹:

All the visitors of Pontini's school – Luigi Bertelli wrote – had immediately become members of the *Dante Alighieri* society, of which he had, from the beginning, explained the patriotic intentions with few and clear words. – The *Dante Alighieri* – he said – is the noblest association in Italy. It was established in 1889, and Ruggero Bonghi was one of its passionate supporters, along with senators, deputies, writers and scientists of every party. [...] The very purpose of *Dante Alighieri* is therefore to make every effort to ensure that the Italian children, far from the Fatherland or subjected to other nations, continue to be Italians. [...] And a similar society could not have another patron but Dante, the high personification of the Italic genius, the founder of our language, the most powerful intellect of the world⁴².

4. «When the Fatherland calls...»: The Pontini family's return to Italy

In the final part of *O patria mia...*, the narration of the Pontini's vicissitudes suddenly changes direction, with the return to Italy of the family of emigrants and new experiences and situations:

I have to tell you now – Giovanni announced to his family – things that will make you feel happy and sorry at one time. You see: here, where I came as a poor man... and you, Elvira, you know... after so much effort I finally found the way of prosperity; and, my boys, I was happy in thinking of leaving you in a very strong and secure life against any adversity... Well, now, at the best moment, I have to abandon these places where I had found the fortune and where I was happy... Here is a sad thing! – O God!... But why? – Elvira said,

⁴¹ On the National Society «Dante Alighieri» see: B. Pisa, *Nazione e politica nella Società Dante Alighieri*, Roma, Bonacci, 1995; P. Salvetti, *Immagine nazionale ed emigrazione nella Società Dante Alighieri*, Roma, Bonacci, 1995.

⁴² Bertelli (Vamba), *O patria mia...* «degna nutrice delle chiare genti», cit., vol. III, pp. 264-265.

recovering from the astonishment due to her husband's speech. – Because we go to Italy! Giovanni said. – Really? Good! Hooray! The boys shouted. – And here's a happy thing: happy for you too, Elvira, I notice it from your eyes that already see the lovely celebration of your beautiful Naples...

And then:

– I, who taught you the duties that we all have towards the homeland, – Giovanni continued, – I missed the first, the most sacred one: I did not answer when it called me under the arms. Dear children, at that time I struggled as a desperate man to keep my head above the stormy water of American life. [...] But now the homeland is in war, and I go to it to ask forgiveness and to offer my life! And here, my kids, a happy thing. – Everyone had tears in their eyes, and there was such a turmoil in the feelings that shook those good and kind souls that only Michelino was able to say a few words: –Father, if you go to war, I come too! – From that day on, everyone started preparing for the departure, which also became the topic of every speech⁴³.

At the end of a several-week journey on the transatlantic *Garibaldi*, sailing from Buenos Aires to Genoa, the Pontini family finally comes to Italy and here Giovanni can finally enlist and take part – like «every true patriot» – to the Italian-Turkish War (28th September, 1911 – 18th October, 1912), of which the reading book for Italian schools abroad provides a reconstruction of the various stages of the and most relevant episodes through the letters sent by him to his wife and children⁴⁴.

In the continuation of *O patria mia...* Giovanni, returned to Italy after the victorious end of the African war, «accepted with enthusiasm the place offered to him by the government» in Tripolitania, «pleased to offer to his Land that clever energy that he had so far employed in the foreign land».

After having fulfilled «for more than two years» the important office with so much skill, prudence and zeal to earn «his superiors' esteem and admiration and his subordinates' respect», in May 1815, at the entrance of Italy in World War I, Giovanni left Tripoli, his working place, to enlist with his elder son Guido in the Italian army and return to defend on the battlefields «the Honor of the threatened Homeland».

Just as in the case of the Italian-Turkish War Luigi Bertelli, through the letters sent by Giovanni and Guido to their family, retraced in *O patria mia...* the most significant stages of Italian experience in the first world war and the main patriotic episodes, citing, among other things, the sacrifice of the martyrs of irredentism (Cesare Battisti, Fabio Filzi and Damiano Chiesa), the rifleman Enrico Toti's heroic gesture, the disastrous retreat of Caporetto and the heroic counter-offensive operated by the Italian army on Piave and then on Mount Grappa, to the long-awaited final victory, celebrated by the reading book for

⁴³ *Ibid.*, pp. 269-271.

⁴⁴ *Ibid.*, pp. 287-304.

Italian schools abroad in the final famous *Bollettino della Vittoria* signed on 4th November 1918 by the supreme commander of the Italian army Armando Diaz⁴⁵.

The return to the home of the Veteran Giovanni Pontini offered the opportunity to the author of *O patria mia...* to propose to his young readers a further reflection on the patriotic love and the deep meaning that the sacrifice of war had for the Italians:

On the morning of 12th October, 1919, while Mrs. Elvira and her two children were having breakfast, they were shocked by a loud ringing. – It's him! It's him! It's the dad! The children shouted, leaping to their feet and rushing to the door. [...] With that joy that has no words, they all gather together and they stay there for a while. [...] When the group finally breaks up, Giovanni totters a little, and as he stretches his right leg to balance, Elvira, looked at him, shouts, and turns pale... Again she approaches him, trembling... [...] But Pontini is self-possessed again and gently removing his sons and his wife, says with a sure voice: –Go away, my angels, do not torment you and do not torment me in this moment of joy; and thank God that he gave it to us while, unfortunately, he did not give it to so many families... Sure, I lost one leg, but I assure you that with this wooden leg I walk almost as well as before and, as you see, without a crutch. [...] This man's good and healthy cheerfulness, his strong Italian virtue, had the upper hand again, and he succeeded in consoling his family, yet not dissipating the pain of seeing him mutilated. [...] Giovanni pulled out of his pocket a small case and opened it, showing the silver medal that the children and their mother kissed⁴⁶.

The narration of the events immediately after the end of the First World War culminated with the episode of Gabriele D'Annunzio's Fiume Exploit, dear to Vamba⁴⁷, who imagined that Giovanni Pontini's firstborn, Guido, just back from the front, had decided to go voluntarily to Fiume, where he fought «for a holy and Italian cause», and «to offer his arm to the holocaust city, as D'Annunzio calls it, which wants to be joined to the Fatherland». With the reference to a story such as that of Fiume and the territories of Dalmatia, that «a treaty, unfortunately also subscribed by Italy», assigned to Yugoslavia («No treaty is possible when it contrasts with the feeling of justice and especially with that of nationality»)⁴⁸, the version of *O patria mia...* was concluded by Luigi Bertelli, shortly before dying.

⁴⁵ *Ibid.*, pp. 319-345.

⁴⁶ *Ibid.*, pp. 346-349.

⁴⁷ In 1919, as it is well-known, Luigi Bertelli became passionate about the Fiume Exploit, which he celebrated with particular emphasis on the pages of «Il Giornalino della Domenica». Following Gabriele D'Annunzio's invitation (the writer's letter was reproduced «Il Giornalino della Domenica», vol. VII, n. 44, 19 October 1919, p. III), indeed, in October and in November of that same year he went to Fiume with Giuseppe Fanciulli to know the situation better. See G. Fanciulli, *Ieri e oggi (Tornando da Trieste)*, «Il Giornalino della Domenica», vol. VII, n. 48, 16 November 1919, pp. 1-2; and G. Fanciulli, *Vamba a Fiume*, «Il Giornalino della Domenica», vol. I, n. 49, 27 November 1921, pp. 2-3.

⁴⁸ Bertelli (Vamba), *O patria mia...* «degnu nutrice delle chiare genti», cit., vol. III, pp. 350-352.

As mentioned before, the pages commissioned by Bemporad and prepared by the curator Ermenegildo Pistelli with the collaboration of Ferruccio Orsi then followed, which had to «update the work up to the present times» and, in particular, adapt its spirit and purpose «to the historical and political requirements» of the country «since 28th October, 1922 onwards», i.e. following the march on Rome and the advent of Fascism.

Indeed, the narration of the most recent political events and of the last vicissitudes experienced by the Pontini family, «the protagonists of this historical narration presented by the unforgettable *Vamba*», was characterized by a marked ideological and political imprint, so as to give to the last of the three volumes that composed the reading book for Italian schools abroad written by the Tuscan writer who died two years before, an embarrassing profile of Mussolini's propaganda tool among the youth:

Perhaps you do not know, Giovanni, – Elvira interrupted him [as we can read in a conversation between our two protagonists inserted posthumously by the curator Ermenegildo Pistelli to celebrate fascism] lowering his voice, almost fearing – that there is a terrible powerful party in Italy that denies the homeland, which... – I know, Elvira. Unfortunately I know! Some of them, perhaps more foolish than evil, were also among the files of our army and made a poisonous propaganda; and it is certain that that propaganda contributed to the defeat of Caporetto. [...] But see, Elvira, another party was established, beautiful of youth, of generous courage and fervent love of Fatherland, to defend those holy ideals that enlightened so many of our martyrs', so many of our heroes' lives: a sacred army guided by a privileged man of intellect, courage, faith, and will. [...] – But this is Benito Mussolini, the founder and leader of Fascism. – Exactly. He is the predestined man Italy needed at this time. When the time has come, God always gives the peoples who fight for a just cause, the Duce they need to obtain the victory⁴⁹.

And again, with reference to the new season inaugurated with the advent of the Fascist regime in Italy:

The Pontinis, [...] after having witnessed, with the spirit tortured by anger, to the Bolshevik example, finally saw the part of the people who remained healthy in that wave of madness, reacting to the sacrilegious denials and the controversial outrages. [...] Thus, for the providential work of a man, to whom the intensity of intellect, readiness of judgment, energy in work, austerity in command, inflexibility of character and the living and profound love of Fatherland give extraordinary power, Italy, finally freed from coward and inactive rulers, ambitious demagogues, political charlatans and subversives' risings, returned to the worship of the holy ideals as in the most radiant days of our Risorgimento and was preparing to accomplish in the world its mission affirmed by Dante, and confirmed by Giuseppe Mazzini, a mission of civilization and glory, by immortal Rome⁵⁰.

An end, the one above mentioned, which, on the one hand, justifies, at least in part, the extraordinary fortune encountered by *O patria mia*... during the

⁴⁹ *Ibid.*, pp. 352-354.

⁵⁰ *Ibid.*, pp. 365, 371.

1920s and 1930s in the Italian schools abroad, while, on the other, testifies the real distortion, pursued for purely commercial reasons by Bemporad and his collaborators, of Luigi Bertelli's idea of national education and promotion of homeland love among young people, pursued with profound coherence by throughout his life and witnessed by the lively pages of the periodical «Il Giornalino della Domenica» (1906-1920) and numerous and celebrated writings (novels, short stories, school textbooks ecc.) for children and young people⁵¹.

5. *The fortune of O patria mia... in Italian schools abroad: the case of Brazil*

Edited between 1922 and 1924, as we have already mentioned, Luigi Bertelli's three volumes of the reading book for the Italian schools abroad, *O Patria mia... «degnu nutrice delle chiare genti»*, had an initial run of 5,500 copies a year and, then, in the second half of the 1920s, to 3,300 copies and, after the creation of the new edition with a variety of illustrations, revision and updating» made by Bemporad a decade later in 1932, edited by Ettore Allodoli⁵², of 2,500 copies a year⁵³.

Immediately adopted in the school of the colonies and in the Italian schools established in the countries where Italian immigrants' communities were present, *O Patria mia...* by Luigi Bertelli encountered especially in Brazil a remarkable success, being among the most widely used reading books in the last classes of the elementary course⁵⁴. Even in 1933, for example, Luigi Bertelli's book was among those adopted in the Italian school in Rio de Janeiro – along with Giuseppe Cesare Abba's *Storia dei Mille*, Sivio Pellico's *Le mie prigioni* and Anna Errera's works on Giuseppe Garibaldi and Giuseppe Ernesto Nuccio's

⁵¹ See Ascenzi, «Per educare la gioventù della nuova Italia». *Luigi Bertelli giornalista e scrittore per l'infanzia tra eredità risorgimentale e costruzione di una nuova coscienza etico-civile (1860-1920)*, cit., pp. 22-43.

⁵² Bertelli (Vamba), *O patria mia... «degnu nutrice delle chiare genti»*, nuova edizione riveduta ed aggiornata a cura di Ettore Allodoli, cit.

⁵³ The data on the run of *O patria mia...* are taken from the *Elenco copie volumi autore "Vamba-Bertelli" anni 1918-1945* (typewritten document) attached to the letter sent by the lawyer Piero Calamandrei, on the behalf of the widow Bertelli, to the Casa Editrice Bemporad and dated Florence, 6 August 1936, now in ASGF, Fondo Bemporad, b. 16.8.1.

⁵⁴ See Archivio Storico Diplomatico del Ministero degli Affari esteri (then: ASMAE), Archivio Scuole 1923-1928 and 1929-1935, in particular the documents contained in the envelopes related to Italian schools in Brazil.

ones on Garibaldi's age in Sicily⁵⁵ – for the teaching of homeland history and as the main reference text in the «readings to develop national sentiment»⁵⁶.

From the second half of the thirties, however, the strengthening of the totalitarianism of Mussolini's regime on school publishing⁵⁷ and, in particular, the strengthening of the fascistization process of Italian schools abroad⁵⁸, pushed the Ministry of National Education to urge a profound review of textbooks in use in schools outside the national borders. In such a situation, the publisher Bemporad decided, after the approval of a new «updated and richly illustrated» edition of the reading book *O Patria mia... «degnatrice delle chiare genti»* by Luigi Bertelli – the third in order of time, after those of 1922-1924 and 1932 – to abandon this idea and to use textbooks produced in more recent times and more suitable to the criteria of fascist totalitarianism, compared to «the patriotic work of our *Vamba*» – conceived and written in the pre-fascist era and largely inspired by Mazzini's ideals of post-war nationalism, rather than to Mussolini ideology⁵⁹.

⁵⁵ G.C. Abba, *Storia dei mille, quattordicesima edizione illustrata*, Firenze, Bemporad, 1932; S. Pellico, *Le mie prigioni*, Firenze, Salani, 1931; A. Errera, *Garibaldi. Facile biografia*, Firenze, Bemporad, 1923²; G.E. Nuccio, *Picciotti e garibaldini. Romanzo storico sulla rivoluzione del 1859-60*, Firenze, Bemporad, 1930².

⁵⁶ Scuole italiane all'estero – Rio de Janeiro (Brasile) – Anno scolastico 1933 – XI – *Programma didattico particolareggiato per la Terza classe mista*; Idem – *Programma didattico particolareggiato per la Quarta classe mista*; Idem – *Programma didattico particolareggiato per la Quinta classe mista*, in ASMAE, Archivio Scuole 1929-1935, b. 786.

⁵⁷ See A. Ascenzi, R. Sani, *Il libro per la scuola nel ventennio fascista: la normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizioni, 2009, pp. 35-48.

⁵⁸ See Salvetti, *Le scuole italiane all'estero*, cit., pp. 535-549.

⁵⁹ In a letter sent to Giuseppe Bertelli by the administrative direction of the Bemporad Publishing House and dated Florence on 1st September, 1943 (now ASGF, Fondo Bemporad, b. 16.8.1), it was stated that «we had previously prepared a reprint of the volume 'O Patria Mia' which was then suspended for various reasons». The story of the unpublished reprint of *O Patria mia...*, as far as we can understand by other references contained in the correspondence between the Florentine publishing house and Luigi Bertelli's heirs, should be placed between the fall of 1937 and the early months of 1938.

La escuela privada religiosa en Mallorca durante la postguerra. Cultura y práctica escolar*

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Private religious school in Majorca during the Spanish post-civil war period. School practices and culture

ABSTRACT: Private schools governed by religious orders and congregations are, undoubtedly, one of the major axes around which primary education has been centered in Spain during the 20th century. In this case, with the objective of drawing a picture of how school culture was structured in these institutions during the Spanish post-civil war period, we focus on analyzing dissertations on student teaching experiences that were written by students studying to get their teaching degrees. They are, without a doubt, excellent

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testimonials from which to learn about the *praxis* of the everyday classroom, or at least, about what was considered proper and worthy of reflection. To do this, we look at those dissertations that describe the teaching practices carried out in private religious schools in Majorca between 1939 and 1945, the Spanish post-civil war period.

EET/TEE KEYWORDS: Private school; Religious orders; School culture; Dissertations; Post-war; Majorca; XXth Century.

Introducción

La configuración del Estado liberal en España fue un proceso iniciado durante el siglo XIX que tuvo su continuidad a lo largo del XX. El Estado liberal tendrá entre sus prioridades la organización de un sistema educativo nacional unificado que asegure la escolarización de la infancia y de los jóvenes. Es el momento en el que la escuela pasa a ser una institución sometida al Estado, controlada y configurada mediante disposiciones legislativas. Alejandro Tiana apunta que es precisamente a raíz de la configuración del Estado liberal cuando se puede empezar a distinguir entre escuela privada y pública, ya que en el Antiguo Régimen la mayoría de centros docentes combinaban la financiación pública con la aportada por las familias¹. Respecto a la distinción entre ambas, Tiana apunta la complejidad de establecer a lo largo de la historia límites claros entre los dos modelos. Aunque no supongan criterios contundentes, la cuestión de la financiación y de la titularidad pueden servir de forma provisional².

Otro aspecto a tener en cuenta para abordar el tema de la escuela privada es la orientación de la misma. En el caso de España durante los dos últimos siglos han sido mayormente las órdenes religiosas las dominantes en la gestión de estos centros. De aquí que cuando se habla de escuela privada en España, en muchas ocasiones se asocia ésta con la enseñanza confesional aunque han existido notables excepciones con centros privados impulsados por la burguesía más avanzada o por los movimientos obreros que incluso han sido pioneros en la renovación educativa.

La literatura científica sobre la enseñanza privada religiosa en España no es muy numerosa. Ana Yetano apunta una serie de factores para explicar este hecho³. Esta autora hace referencia básicamente a los problemas para acceder a la documentación por parte de los historiadores profesionales por estar depositada en archivos privados de las propias órdenes o congregaciones. Por

¹ A. Tiana Ferrer, *La escuela privada*, en J.L. Guereña, J. Ruiz Berrio, A. Tiana Ferrer (edd.), *Historia de la Educación en la España contemporánea. Diez años de investigación*, Madrid, Centro de Publicaciones del Ministerio de Educación y Ciencia, 1994, pp. 117-139.

² *Ibid.*

³ A. Yetano Laguna, *La enseñanza religiosa en la España de la Restauración (1900-1920)*, Barcelona, Editorial Anthropos, 1988.

este motivo los estudios que se han hecho se deben en la mayoría de los casos a miembros de las mismas órdenes y congregaciones. Solo en pocos casos los investigadores han tenido facilidades para acceder a la documentación⁴.

En el caso de Mallorca, existen algunas publicaciones sobre la historia de escuelas privadas religiosas concretas la mayoría con un enfoque apologético. Ejemplo de ello son las obras sobre el colegio de San Buenaventura de Lluçmajor⁵, los colegios de los Hermanos La Salle de Manacor⁶, Lluçmajor⁷, Santa Margalida⁸ y el Pont d'Inca (Marratxí)⁹, el colegio Beato Ramón Llull de Inca¹⁰, o el colegio Sagrado Corazón de Palma¹¹. Por último señalar que aún es más reducido el número de estudios dedicados específicamente a estudiar la práctica escolar en estos centros. Dedicándose la mayoría de ellos a analizar aspectos de carácter más cuantitativo como el número de congregaciones dedicadas a la enseñanza o el de escuelas religiosas existentes¹².

1. *La escuela privada religiosa en España, una cuestión singular*

En España la revolución liberal no rompió totalmente con la influencia de la Iglesia. Los liberales establecidos en el poder buscaron ya a mediados del siglo XIX la alianza con la Iglesia y dejaron que ésta interviniese en la educación a partir del acuerdo con el Vaticano de 1851. La ley Moyano (1857), que organizó por primera vez todo el sistema educativo español, consolidó la libertad de creación de centros y reconoció también el papel de control ideológico de la Iglesia

⁴ P. Dávila Balsera, L.M. Naya Garmendia, *Las escuelas de los Hermanos de La Salle en Gipuzkoa. Evolución y tendencias en el alumnado y profesorado (1904-2006)*, «Ikastaria», n. 16, 2008, pp. 271-315.

⁵ *Collegi de San Buenaventura de Lluçmajor. 50è aniversari al seu domicili actual (1934-1984)*, Lluçmajor, Colegio de San Buenaventura, 1984.

⁶ M. Santana Morro, *El Collegi de La Salle a Manacor. Fets, protagonistes i incidència d'una institució educativa (1913-2013)*, Palma, Hermanos de las Escuelas Cristianas de La Salle, 2013.

⁷ S. Rubí Darder, *El Colegio La Salle-San Miguel: en la historia cultural de Lluçmajor (1915-1930)*, Paterna, Hermanos de las Escuelas Cristianas de La Salle, 1976.

⁸ R. Bordoy Pomar, *La Salle a Santa Margalida. 56 anys d'història*, Santa Margalida, Hermanos de las Escuelas Cristianas de La Salle, 1994.

⁹ S. Rubí Darder, *La Salle, Pont d'Inca, escuela, colegio*, Paterna, Hermanos de las Escuelas Cristianas de La Salle, 1985.

¹⁰ M. Miralles Gili, *Col·legi Beat Ramón Llull. Educació, història i societat*, Inca, Gràfiques Mallorca, 2002.

¹¹ Dora et al., *100 años educando. Colegio Sagrado Corazón. Son Españolet*, Palma, Colegio Sagrado Corazón, 2003.

¹² P. Dávila Balsera, L.M. Naya Garmendia, *La enseñanza privada religiosa en España: instituciones, políticas e identidades*, en J. Pintassilgo (coord.), *Laicidade, Religiões e Educação na Europa do Sul no Século XX*, Lisboa, Instituto de Educação da Universidade de Lisboa, 2013, pp. 367-392. V. Faubell Zapata, *Educación y órdenes y congregaciones religiosas en la España del siglo XX*, «Revista de Educación», núm. extraordinario, 2000, pp. 137-200.

incluso en la enseñanza pública. A pesar de algunos intentos de la burguesía más comprometida con las ideas liberales y la revolución industrial, la poca inversión del Estado en educación propició el desarrollo de una red de centros escolares religiosos que se consolidará especialmente a partir de la Restauración monárquica (1874-1931). Es lo que Antonio Viñao ha denominado como «el subsistema educativo de la Iglesia católica»¹³, el cual se regirá por sus propias normas y pautas.

Será precisamente durante la Restauración cuando la Iglesia reafirmó su monopolio en el campo educativo y cultural. Es el momento en el que empieza con su «[...] proceso de lanzamiento de familias religiosas, de alumbramiento de verdaderas milicias de enseñantes y educadores, auténticas puntas de lanza en su proceso de reconquista del poder social»¹⁴. Para ese incremento serán determinantes dos factores. Por una parte el retorno de religiosos españoles una vez perdidas las colonias de ultramar en 1898. Y en segundo lugar, la expulsión a principios de siglo XX de las órdenes y congregaciones religiosas de Francia a raíz de la aprobación en 1904 de la Ley de 7 de julio. Muchas de estas congregaciones acabarán recabando en España. Dicha ley, resultante de la política anticlerical del entonces presidente francés Émile Combes, impedirá el ejercicio de la función docente a cualquier miembro perteneciente a una congregación religiosa¹⁵. De aquí que a la hora de analizar la enseñanza religiosa en España, no podamos dejar al margen la influencia que tendrán sobre la misma las diferentes órdenes de origen francés como las Religiosas de la Compañía de María, las Religiosas del Sagrado Corazón, los Hermanos de La Salle, los Hermanos Maristas, las Hijas de la Caridad de San Vicente de Paul o las Hermanas de la Caridad Dominicanas de la Presentación de la Santísima María.

El siguiente de los períodos que afectará al tema de la enseñanza religiosa en España será el de la II República (1931-1936). Con la instauración del gobierno republicano, se iniciarán una serie de reformas que irán encaminadas a establecer la separación del Estado y la Iglesia. La nueva Constitución de 1931 proclama un Estado laico. Además, se prohibirá el ejercicio de la enseñanza para toda aquella persona que forme parte de algún tipo de congregación o orden religiosa. Todos estos puntos, contenidos en la Constitución, serán desarrollados con posterioridad en la Ley de Confesiones y Congregaciones Religiosas (1933).

¹³ A. Viñao Frago, *Escuela para todos. Educación y modernidad en la España del siglo XX*, Madrid, Marcial Pons Historia, 2004, p. 201.

¹⁴ Yetano Laguna, *La enseñanza religiosa en la España de la Restauración (1900-1920)*, cit., p. 12.

¹⁵ La Ley de 7 de julio de 1904 será uno de los múltiples ejemplos de la política anticlerical llevada a cabo por el gobierno francés a principios de siglo XX. Previamente, en 1901, ya se aprobó la Ley de Asociaciones Religiosas con René Waldeck-Rousseau como presidente.

Esta política laicista, desarrollada en el llamado Bienio Progresista (1931-1933), se verá congelada o interrumpida a raíz de la victoria de las fuerzas de centro-derecha en las elecciones de noviembre de 1933. En febrero de 1936 las fuerzas de izquierda recuperarán el poder pero la normalidad se ve interrumpida el 18 de julio de aquel año por la insurrección militar contra la República. Serán casi tres años de guerra que enfrentará a partidarios de la República con los sublevados contra ella. Estos últimos, liderados por el general Francisco Franco, saldrán victoriosos de la contienda instaurando en España una dictadura que durará casi cuarenta años (1939-1975).

Una vez se instaura la dictadura en España, los nuevos gobernantes aplicaran en la educación el principio de subsidiariedad. Considerando que el Estado solo debe intervenir si la iniciativa privada no cubre la demanda educativa existente. Esta orientación permitió un gran crecimiento de la educación privada y especialmente de la religiosa. La ley de 17 de julio de 1945 sobre Educación Primaria reconoce el derecho del Estado a crear y sostener escuelas siempre y cuando éstas no estén cubiertas por la iniciativa privada o la Iglesia. En palabras de Manuel de Puelles, esto «[...] significa la victoria de una política que condenaba al Estado a una inhibición en educación casi absoluta hasta muy avanzada la década de los años cincuenta»¹⁶. En la ley de 1945, se reconoce el derecho de la Iglesia a crear escuelas de formación del magisterio, añadiéndose también la facultad de inspección y vigilancia de dichos centros.

En Mallorca en los inicios del siglo XX la escuela religiosa tenía ya una fuerte implantación. En la isla el catolicismo, muy bien organizado, tuvo voluntad y capacidad para no dejarse arrebatar un espacio tan importante para su influencia como la educación¹⁷. Las escuelas de las órdenes y congregaciones religiosas no dejaron de crecer a lo largo de la segunda mitad del siglo XIX y, especialmente, como en el conjunto del Estado, desde la Restauración. Las congregaciones religiosas femeninas extendidas por todos los pueblos de las islas controlaron la educación elemental de las chicas. En 1926 el número de niños y niñas escolarizados en las escuelas primarias privadas representaba en Baleares un 62,5% cuando en el conjunto del Estado no superaba el 26%¹⁸. El poder y la influencia social de la Iglesia católica en Mallorca se reforzó aún más con el pontificado del obispo Pere Joan Campins y Barceló (1898-1915). Este prelado en el tiempo que ocupó la sede episcopal de Mallorca emprendió un amplísimo plan de reformas que incluyó la mejora del plan de estudios del seminario, la intervención del arquitecto Gaudí para reformar la catedral de

¹⁶ M. de Puelles Benítez, *Evolución de la educación en España durante el franquismo*, en A. Tiana, G. Ossenbach, F. Sanz (coord.), *Historia de la educación (Edad Contemporánea)*, Madrid, Universidad Nacional de Educación a Distancia, 2002, p. 337.

¹⁷ P. Fullana Puigserver, *El moviment catòlic a Mallorca (1875-1912)*, Barcelona, Publicacions de l'Abadia de Montserrat, 1994.

¹⁸ B. Sureda Garcia, *L'educació a les Balears en el segle XX*, Palma, Edicions Documenta Balear, 2000.

Palma, la organización de manifestaciones contra la escuela laica¹⁹ e incluso la creación de los Boy Scouts católicos para evitar que estos fuesen creados fuera del control de la Iglesia²⁰. La Iglesia mallorquina y las congregaciones religiosas se resistieron cuanto pudieron a las medidas secularizadoras de la II República de manera que la actuación escolar de las organizaciones católicas prácticamente no se vio afectada²¹.

En Baleares una vez instaurada la Dictadura franquista buena parte de la responsabilidad educativa se cede a la Iglesia y a las congregaciones y órdenes religiosas, que como se ha visto, tenían un peso muy importante en la enseñanza antes de la República. El programa de construcciones escolares que emprendió el régimen republicano queda paralizado y hay que esperar a 1953, con Joaquín Ruiz-Giménez como ministro de Educación Nacional, para volver a encontrar indicios de interés para la planificación de la enseñanza pública.

En el caso concreto de Mallorca las escuelas de las congregaciones religiosas ya recuperaron su normalidad durante el periodo de la guerra al triunfar desde el primer momento la sublevación militar. Al mismo tiempo que ampliaban la oferta de enseñanza primaria, se iniciaba la expansión de las congregaciones religiosas en el campo de la enseñanza secundaria. En este nivel en Mallorca la actuación de los religiosos no había sido tan importante comparado con otras zonas del Estado como Cataluña. A lo largo de los años cuarenta y cincuenta órdenes y congregaciones religiosas masculinas como los Jesuitas, Franciscanos, Teatinos, La Salle, Agustinos, Salesianos, Congregación de S. Felipe Neri o femeninas como Misioneras del Sagrado Corazón, Franciscanas de la Inmaculada y religiosas de la Pureza, crearon colegios y centros de enseñanza secundaria que se concentraron en los grandes núcleos urbanos de las islas. La difusión de estos centros se vio favorecida por la nula intervención pública en estos niveles llegando a suprimirse durante la guerra los Institutos Elementales de enseñanza secundaria creados por la República en Inca y Felanitx. Éstos se volverán a crear en 1950 como Institutos Laborales²². La enseñanza pública secundaria en Baleares se redujo durante muchos años a dos institutos en Palma – uno masculino y otro femenino –, uno en Mahón y otro en Ibiza. En el curso 1944-45 en Mallorca el porcentaje de alumnos de secundaria en centros públicos era tan solo del 7,29% para los chicos y de 19,71% para las chicas²³.

¹⁹ G. Janer Manila, *La reacció mallorquina contra l'Escola Laica després de la Setmana Tràgica*, en *I Jornades d'història de l'ensenyament als Països Catalans*, Barcelona, 1977, pp. 10-21.

²⁰ G. Janer Manila, B. Sureda Garcia, *La lluita pel control de l'educació: el pontificat del bisbe Campins (1898-1915)*, en B. Sureda et al., *L'Educació a Mallorca. Aproximació històrica*, Palma, Editorial Moll, 1977, pp. 109-140.

²¹ P. Fullana Puigserver, *Església i educació a la Mallorca del segle XX*, «L'Arc», vol. 5, 1998, pp. 42-49.

²² Sureda, *L'educació a les Balears en el segle XX*, cit.

²³ Instituto Nacional de Estadística de España. *Anuario Estadístico de España. Año 1944-1945*.

El resto se distribuían entre centros colegiales, la mayoría, y escuelas privadas que los preparaban para presentarse a los exámenes de los institutos oficiales.

2. *Las memorias de prácticas como fuente para el estudio de la cultura escolar*

Antes de entrar en el análisis de las memorias como fuente para el estudio de la práctica escolar, es preciso indicar que se entiende por cultura escolar o cultura de la escuela. Entre los autores que han tratado el tema cabe destacar a Dominique Julia, introductor del término entre los historiadores de la educación²⁴. Otras aportaciones son las de Agustín Escolano²⁵, Ralf Maslowski²⁶, Antonio Viñao²⁷, Ramón López Martín²⁸, o Antonio Nóvoa²⁹. También es preciso citar una de las obras de referencia, *The Black Box of Schooling: A Cultural History of the Classroom*³⁰. Sin intención de entrar a fondo en el tema podemos hacer referencia a dos de las definiciones que mejor responden a las pretensiones de este trabajo. Según Ralf Maslowski, la cultura escolar puede definirse como «las asunciones básicas, normas, valores y herramientas culturales que son compartidas por los miembros de la escuela y que influyen en su funcionamiento»³¹. Las asunciones básicas son aquellas creencias de carácter inconsciente que orientan y guían el quehacer educativo del maestro y se caracterizan por su resistencia al cambio. Las normas y valores influyen con un mayor grado de conciencia y tratan de

²⁴ D. Julia introduzco el término en la comunidad científica en su conferencia de clausura pronunciada en la XV *International Standing Conference for the History of Education* (ISCHE) celebrada en Lisboa en 1993. Para la versión en castellano del artículo que posteriormente publicó D. Julia en base a su conferencia véase: D. Julia, *La cultura escolar como objeto histórico*, en E. González, M. Menegues (coord.), *Historia de las universidades modernas en Hispanoamérica. Métodos y fuentes*, Ciudad de México, Universidad Autónoma Nacional de México, 1995, pp. 131-153.

²⁵ A. Escolano Benito, *Las culturas escolares del siglo XX. Encuentros y desencuentros*, «Revista de Educación», núm. Extraordinario, 2000, pp. 201-218.

²⁶ R. Maslowski, *School Culture and School Performance*, Enschede, Twente University Press, 2001.

²⁷ A. Viñao Frago, *Sistemas educativos, culturas escolares y reformas*, Madrid, Ediciones Morata, 2002.

²⁸ R. López Martín, *La escuela por dentro. Perspectivas de la Cultura Escolar en la España del siglo XX*, Valencia, Universidad de Valencia, 2001.

²⁹ A. Nóvoa, *Textos, imágenes y recuerdos. Escritura de nuevas historias de la educación*, en T.S. Popkewitz, B.M. Franklin, M.A. Pereira-García Castro (coord.), *Historia cultural y educación: ensayos críticos sobre conocimiento y escolarización*, Barcelona, Pomares-Corredor, 2003, pp. 61-84.

³⁰ S. Braster, I. Grosvenor, M.M. del Pozo Andrés (edd.), *The Black Box of Schooling: A Cultural History of the Classroom*, Brussels, Peter Lang, 2011.

³¹ La traducción al castellano de la definición realizada por Maslowski se ha extraído de: M.M. del Pozo Andrés, T. Rabazas Romero, *Las imágenes fotográficas como fuente para el estudio de la cultura escolar: precisiones conceptuales y metodológicas*, «Revista de Ciencias de la Educación», nn. 231-232, 2012, pp. 401-414, 405.

dar respuesta a lo socialmente aceptado dentro de la escuela. En ocasiones tienen un carácter explícito – están reguladas y sistematizadas –, y en otras no tienen ningún tipo de regulación a nivel formal, hecho que hace que adopten un carácter implícito, son aquellas «[...] ‘reglas no escritas’ de comportamiento»³². Por último encontramos las herramientas culturales – costumbres, rituales, mitos y símbolos –, prácticas con un mayor grado de visibilidad, a pesar que en ocasiones resultan difíciles de conocer sin utilizar documentación muy diversa.

Otra de las aportaciones al tema es la de Agustín Escolano. Según este autor al hablar de los referentes que condicionan la práctica escolar podemos en realidad diferenciar tres tipos de culturas que convergen y interactúan a la vez³³. En primer lugar, encontramos la cultura política o institucional. Ligada al entorno administrativo, la podemos conocer por las diferentes leyes y normativas que regulan la educación formal. La segunda es la cultura académica o científica. La podemos ver reflejada en la literatura científica y en los informes de investigación o textos de teoría de las ciencias de la educación. Por último, encontramos la cultura práctica o empírica, construida a través de las experiencias prácticas que los docentes han ido sedimentando a lo largo del tiempo. La podemos conocer básicamente a partir de diferentes registros como la historia oral, los textos escritos por los agentes partícipes de la realidad educativa – memorias de prácticas de estudiantes de magisterio, cuadernos escolares, memorias de oposiciones –, la iconografía o la cultura material. Es precisamente al acercarnos a esa cultura práctica de la escuela, conformada por los modos de hacer y actuar, cuando nos resultan de gran utilidad fuentes como las memorias de prácticas. Estos testimonios, redactados por estudiantes de magisterio que acudieron a los diferentes centros escolares para realizar las prácticas de enseñanza, son sin lugar a dudas excelentes recursos cuando el historiador pretende adentrarse en la práctica escolar diaria que caracterizó la escuela de un determinado período. Para el presente artículo, nos centraremos en las memorias redactadas por los estudiantes que realizaron sus prácticas de enseñanza en las escuelas privadas religiosas de Mallorca entre los años 1939 y 1945.

Antes de adentrarnos en la descripción y análisis del fondo de memorias utilizado, podemos citar como estudios que ya han utilizado este tipo de fuentes el de Fernández Soria y Agulló³⁴, en el que se revisan toda una serie de memorias escritas durante los veranos de 1908 y 1909 por maestros y maestras valencianos que estaban en activo. En esta misma línea cabe destacar los trabajos realizados a partir del «Fondo Romero Marín» compuesto por las memorias de prácticas que redactaron los estudiantes de Pedagogía de la Universidad Complutense de

³² *Ibid.*

³³ Escolano Benito, *Las culturas escolares del siglo XX. Encuentros y desencuentros*, cit.

³⁴ J.M. Fernández Soria, M.C. Agulló Díaz, *Los temas educativos en las Memorias del Magisterio Valenciano (1908-1909)*, Valencia, Universidad de Valencia, 2002.

Madrid entre 1949 hasta mediados de la década de los setenta³⁵. Otra de las investigaciones que podemos citar es la realizada por Barceló, Comas i Sureda, que es un trabajo previo al que ahora se presenta y en el que se analizan las memorias referidas a la escuela pública³⁶.

Las memorias utilizadas en este artículo se encuentran en el Archivo Histórico de la Universidad de las Islas Baleares (AHUIB) donde se custodian los fondos de las antiguas Escuelas Normales de Baleares y Escuela de Prácticas. Las memorias halladas forman parte de una colección de un total de 397 memorias realizadas por los alumnos de las Escuelas Normales públicas de Baleares entre los años 1914 y 1959³⁷. De éstas, un total de 137 fueron redactadas durante la década de los cuarenta, época de postguerra³⁸. Un total de 97 nos relatan prácticas efectuadas en escuelas públicas (1939-1948)³⁹ y 40 lo hacen de escuelas privadas religiosas (1939-1945)⁴⁰. Cabe señalar que solo a partir del final de la Guerra Civil se envían alumnos de prácticas a los centros privados.

A nivel geográfico, cabe indicar que mientras las memorias de escuelas públicas nos describen centros de todas las Baleares, en el caso de la escuela privada religiosa solo tenemos memorias de escuelas de Mallorca, ubicadas tanto en zonas urbanas como rurales. Palma es la localidad en la que encontramos un mayor número de memorias (22), seguido de Lluçmajor (8), Marratxí (3) y Artà (3). Otros municipios de los que también tenemos testimonios son Inca (2), Sóller (1) y Pollença (1). De las memorias de las escuelas públicas, 53 fueron redactadas por hombres y 44 por mujeres. De las referentes a escuelas privadas 34 fueron redactadas por hombres y solo 6 por mujeres. El hecho de que fuesen enviados más hombres que mujeres a la escuela privada puede explicarse por el hecho de que muchos de los alumnos varones eran religiosos y algunos de ellos estaban relacionados con los centros en los que hacían las prácticas.

³⁵ M.M. del Pozo Andrés, T. Rabazas Romero, *Políticas educativas y prácticas escolares: la aplicación de la Ley de Enseñanza Primaria de 1945 en las aulas*, «Bordón», vol. 65, n. 4, 2013, pp. 119-133; M.M. del Pozo Andrés, T. Rabazas Romero, *Imatges fotogràfiques i cultura escolar en el franquisme: una exploració de l'arxiu etnogràfic*, «Educatió i Història. Revista d'Història de l'Educació», n. 15, 2010, pp. 165-194; A. Martínez Navarro, *Un seminario sobre fuentes históricas en el Museo de Historia de la Educación de la Facultad de Educación de la Universidad Complutense*, «Revista Complutense de Educación», vol. 8, n. 1, 1997, pp. 305-318.

³⁶ G. Barceló Bauzá, F. Comas Rubí, B. Sureda García, *Abriendo la caja negra: la escuela pública española de postguerra*, «Revista de Educación», n. 371, 2016, pp. 61-82.

³⁷ Para la consulta del citado fondo véase: Archivo Histórico de la Universidad de las Islas Baleares (AHUIB). Fondo Escola Normal de Magisteri i Annexa (1842-1988) (FENMA), legajos 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192 y 193.

³⁸ AHUIB (FENMA), legajos 189-192. La única memoria redactada con posterioridad a la década de los cuarenta, época de postguerra, pertenece a unas prácticas de enseñanza realizadas en una escuela religiosa durante los años cincuenta. Para su consulta véase: AHUIB (FENMA), legajo 193. De aquí que la cifra total de memorias de la época franquista ascienda a 138 si tenemos en cuenta la citada memoria.

³⁹ AHUIB (FENMA), legajos 189-192.

⁴⁰ AHUIB (FENMA), legajos 189-191.

En relación a los aspectos formales de las memorias debe señalarse la falta de homogeneidad. Algunas están mecanografiadas otras manuscritas, son de diverso tamaño – folio, formato cuaderno o cuartilla – y presentan una extensión variable. En el contenido suelen tratar los mismos puntos, aunque no existe un orden preestablecido en cuanto a su presentación. Este hecho nos induce a pensar que sí se dieron unas pautas concretas sobre los diferentes contenidos y temáticas a tratar, aunque no hubiera un formato estándar de memoria. Otro de los puntos a tener en cuenta es que las memorias eran un ejercicio académico que era evaluado y por tanto condicionado por la voluntad de aprobar, hecho que sin duda influyó en la redacción de las mismas. Por último, también debemos tener presente el grado de subjetividad-objetividad. Las memorias, al ser un testimonio documental basado en observaciones realizadas por alumnos de la Escuela Normal, están condicionadas por una serie de factores como la predisposición hacia la orientación del centro, la ideología del alumno o la formación previa. En el caso de las memorias de escuelas religiosas, cabe tener en cuenta estos condicionantes aún más si tenemos presente, como se ha indicado, que algunos de los alumnos en prácticas eran personas que se dedicaban a la vida religiosa. Algunos de los cuales se dedicaron a ejercer en escuelas religiosas una vez finalizada la carrera de Magisterio. Y es que aunque encontramos descripciones y comentarios basados en hechos objetivos – nivel de asistencia a clase, características de los edificios y espacios, niveles de matrícula, materiales de enseñanza, decoración del aula, entre otros –, también hallamos comentarios con una importante carga subjetiva. De aquí la importancia de tener presente que nos encontramos ante un tipo de fuente con un grado alto de subjetividad, característica que por otra parte comparten con el resto de testimonios utilizados en la reconstrucción histórica.

3. Cultura y práctica escolar en los colegios religiosos de Mallorca durante la postguerra. Una aproximación a través de las memorias de prácticas

Para presentar los datos y observaciones que aparecen en las memorias se ha establecido una clasificación temática que presentamos a continuación.

Edificios y espacios

La mayoría de las memorias (33 de 40) aportan información sobre las características de los edificios y espacios. En éstas se destacan la calidad de las instalaciones y la idoneidad de los espacios que disponen los centros religiosos para desarrollar sus actividades. Es una situación muy diferente a la que se describe en las memorias de prácticas realizadas en escuelas públicas, donde

la precariedad y la falta de recursos es una constante en las descripciones⁴¹. Como ejemplo de estos comentarios podemos citar la memoria de Jorge Mut, quien realizó sus prácticas en el colegio de San Buenaventura de Lluçmajor y que afirma «[...] los locales son excelentes y se dispone de los elementos necesarios para una buena formación de la niñez»⁴². Los centros escolares religiosos ocupaban en la mayoría de los casos edificios de grandes dimensiones que permiten una graduación de la enseñanza que no puede hacerse en muchas escuelas públicas. Incluso en algunos centros la amplitud de las instalaciones permitía impartir la enseñanza primaria y secundaria. Recurriéndose también a la historia del edificio con el fin de demostrar sus amplias dimensiones. Este era el caso del colegio de los jesuitas de MontisIÓN de Palma del que se dice: «[...] se ha asentado en él, en diversas fechas, el Instituto de Segunda Enseñanza y la Escuela Normal de Palma. Solo por estos hechos no será necesario resaltar las condiciones de capacidad y amplitud suficiente que este Colegio presenta»⁴³. En referencia a la ventilación y iluminación de las aulas, todos los alumnos en prácticas destacan la presencia de amplios ventanales que permitían trabajar a los alumnos con la iluminación necesaria. En otros casos se destaca la existencia de una buena iluminación eléctrica.

Las excelentes condiciones higiénicas de las instalaciones son un aspecto destacado en las descripciones realizadas por los practicantes. La importancia otorgada a la higiene la vemos reflejada por ejemplo en la memoria del practicante S. Montelongo del colegio de San Alfonso de Palma «[...] las paredes limpias, sin una raya de lápiz, nos hablan de la educación que dentro de ellas reciben los pequeños»⁴⁴. En la mayoría de memorias se hace referencia a la existencia de lavabos o, incluso, duchas como en el caso del colegio La Salle del Pont d'Inca en el municipio de Marratxí⁴⁵.

Las memorias prestan atención a los espacios dedicados al juego y esparcimiento. En la mayoría se destaca que disponían de jardines o patios, excepto el caso del colegio de San Buenaventura de Lluçmajor que, debido al gran número de niños matriculados, se tenían que desplazar al campo de deportes anexo a la escuela. En relación a los espacios de recreo en algunos casos, como en el de los colegios de los Hermanos La Salle de Palma y del Pont d'Inca, las memorias hacen referencia a una zona cubierta para los recreos durante los días de mal tiempo.

Se habla también en la mayoría de memorias de las llamadas dependencias anejas. Hay referencias a colegios que contaban con cine sonoro (colegio

⁴¹ Barceló Bauzá, Comas Rubí, Sureda Garcia, *Abriendo la caja negra: la escuela pública española de postguerra*, cit.

⁴² AHUIB (FENMA), legajo 189, E. Riera, Colegio de Nuestra Señora de MontisIÓN de Palma, 1940, p. 1.

⁴³ *Ibid.*

⁴⁴ *Ibid.*, p. 4.

⁴⁵ AHUIB (FENMA), legajo 189, A. Seguí, Colegio La Salle del Pont d'Inca (Marratxí), 1940.

La Salle de Palma y colegio de los Padres Teatinos de Pollença), laboratorio (colegio de Montisón de Palma), teatro (colegio de los Padres Teatinos de Pollença y colegio Beato Ramón Llull de Inca), salón de actos (colegio La Salle de Palma), aula de dibujo (colegio de San Buenaventura de Lluçmajor), aula de música (colegio de las Hermanas Trinitarias de Palma) y capilla (colegio de San Alfonso de Palma).

Respecto a los elementos ornamentales presentes en este tipo de centros podemos decir que en la mayoría de memorias se destaca la presencia del retrato de Franco como jefe del Estado, el crucifijo e imágenes de temática religiosa. No se menciona en las memorias la existencia de símbolos de carácter falangista como el retrato de José Antonio Primo de Rivera o el escudo de la Falange. Símbolos que sí se describen en las memorias de prácticas realizadas en las escuelas públicas⁴⁶. Este punto deja entrever la pugna por el control educativo e ideológico que ya protagonizaron la Iglesia y Falange durante los primeros años de postguerra y que se agudizará en años posteriores.

Junto con estos símbolos, introducidos obligatoriamente desde el principio de la Guerra Civil⁴⁷, también se hace referencia a otros elementos decorativos como plantas, dibujos, trabajos realizados por los niños o materiales del museo escolar. En casos más concretos, como el colegio de San Buenaventura de Artà, se nos habla de aulas decoradas con el escudo del pueblo⁴⁸ o con la esfinge del General Franco tal y como sucedía en el colegio de San Buenaventura de Lluçmajor⁴⁹.

Mobiliario y material para la enseñanza

Este tema aparece en la mayoría de las memorias (32 de 40). En un gran número de ellas nos presentan unos centros escolares donde el mobiliario y el material pedagógico se caracteriza por su buen estado y calidad, hecho que coincide, para este tipo de centros, con lo indicado por otros autores como Sánchez-Redondo⁵⁰. La calidad del mobiliario, del material didáctico, así como las condiciones de los edificios serán uno de los rasgos característicos de la escuela privada religiosa en España. Prueba fehaciente de ello son las descripciones realizadas por el practicante Alberto Álvarez, quien describe el colegio de los Sagrados Corazones de Sóller como un centro «[...] dotado de

⁴⁶ *Ibid.*

⁴⁷ B. Sureda Garcia, *L'educació a Mallorca a l'època de la Guerra Civil: els canvis a la cultura escolar*, «Educació i Història. Revista d'Història de l'Educació», n. 12, 2008, pp. 65-90.

⁴⁸ AHUIB (FENMA), legajo 189, J. Server, Colegio de San Buenaventura de Artà, 1940.

⁴⁹ AHUIB (FENMA), legajo 191, A. Martín, Colegio de San Buenaventura de Lluçmajor, 1944.

⁵⁰ C. Sánchez-Redondo, *Leer en la escuela durante el franquismo*, Cuenca, Ediciones de la Universidad de Castilla-La Mancha, 2004.

excelente material de enseñanza»⁵¹. En la misma línea, José Sabater⁵² describe el material y mobiliario ubicado en el colegio de San Alfonso de Palma. A pesar de ello, cabe reseñar algunos comentarios críticos con la dotación de unos pocos centros de los que se afirma que el material y el mobiliario se caracterizaran por su antigüedad y poca conservación. Este es el caso, tal y como expone Juan Server en su memoria⁵³, del colegio franciscano de San Buenaventura de Artà. Por su parte Sebastián Cardell también denuncia la falta de recursos en el colegio de la misma congregación ubicado en Lluçmajor. En palabras del alumno Cardell «[...] el material completo es muy difícil de adquirir porque cuesta mucho y por esto es que apenas está en contacto con los niños, tiene que conservarse inmaculado en las vitrinas»⁵⁴. Es decir que lo tenían pero no lo usaban para no deteriorarlo.

En la mayoría de memorias se hace referencia a la misma tipología de muebles: bancos bipersonales, mesas individuales, mesa del docente, tarimas, encerados, guardarropas, armarios para guardar el material y estanterías para colocar los libros de texto y lectura. Encontrándose una única memoria en la que se señala la existencia de mesas para los niños hechas a imagen y semblanza de las del Museo Pedagógico Provincial, clausurado al iniciarse la guerra en 1936⁵⁵.

Según las memorias el material escolar consistía en el necesario para la escritura (plumas, tinteros, lápices, goma y papel secante), para la educación artística (pinturas, acuarelas o cartulinas), colecciones de mapas, figuras geométricas e instrumentos de medida. En el caso del colegio de jesuitas de MontisIÓN una memoria habla de modernos aparatos de proyección como un Kodascope para proyecciones animadas, un Epidiascopio para proyectar diapositivas y un aparato de cine sonoro.

Respecto a los libros de texto encontramos como principal instrumento didáctico las enciclopedias escolares. Elaboradas normalmente por las editoriales FTD, Seix y Barral, Hijos de Santiago Rodríguez y Dalmau Carles. En cambio, los cuadernos utilizados para la realización de ejercicios prácticos eran los de la editorial Bruño que, según Melchor Tugores del colegio La Salle de Palma (1940), interesaban por su carácter procedimental y por el uso de métodos intuitivos⁵⁶. Otras obras, de orientación religiosa en este caso, serán las utilizadas en el colegio San Buenaventura de Artà. Tal como nos cita el alumno

⁵¹ AHUIB (FENMA), legajo 189, A. Álvarez, Colegio de los Sagrados Corazones de Sóller, 1940, p. 3.

⁵² AHUIB (FENMA), legajo 190, J. Sabater, Colegio de San Alfonso de Palma, 1941.

⁵³ AHUIB (FENMA), legajo 189, J. Server, Colegio de San Buenaventura de Artà, 1940.

⁵⁴ AHUIB (FENMA), legajo 191, S. Cardell, Colegio de San Buenaventura de Lluçmajor, 1944, p. 2.

⁵⁵ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de MontisIÓN de Palma, 1940.

⁵⁶ Melchor Tugores Serra, ya era presbítero y, como es sabido, la Editorial Bruño pertenecía a los Hermanos de las Escuelas Cristianas de La Salle.

M. Tous (1940) se utilizaban el *Pequeño artista cristiano* y *El Catecismo por el dibujo*. Respecto a los libros de lectura encontramos referencias a obras como, *Lectura Graduada de FTD*, *El Quijote* y *Héroes*.

Se menciona también la existencia de algunos materiales propios de la enseñanza intuitiva y activa, característica que también encontramos en las memorias de prácticas de centros públicos⁵⁷. El caso más destacable es el del colegio de las Hermanas Trinitarias de Palma, donde su alumna en prácticas, Francisca Cladera (1940), nos detalla la presencia de una colección de juegos de Fröebel y diferente material Montessori para la educación sensorial del niño⁵⁸.

Organización escolar

La circular aprobada por el Ministerio de Educación Nacional el 5 de marzo de 1938⁵⁹, será el referente legislativo en materia de enseñanza primaria hasta la aprobación de la Ley de Educación Primaria (1945)⁶⁰. En esta normativa, dirigida a inspectores y maestros de escuelas públicas y privadas, se estipularán toda una serie de cuestiones que afectaran al nuevo modelo escolar de las zonas ocupadas por los franquistas. Recordemos que en 1938 aún no había finalizado la guerra. Dicha normativa afectará posteriormente a todo el territorio nacional, una vez finalizado el conflicto bélico en abril del 1939. Una muestra importante de las memorias (32 de 40) hacen referencia a cuestiones relacionadas con la organización de la escuela. Presentamos las referencias encontradas sobre el tema agrupadas en los siguientes bloques.

a) Matrícula y asistencia

Las memorias recalcan que los controles de asistencia a clase eran una de las principales características de este tipo de centros y que el absentismo era muy bajo. Este hecho, contrasta con las observaciones hechas en memorias que detallan prácticas de enseñanza en escuelas públicas. Testimonios en los que se recalca que los alumnos dejaban de asistir con mayor frecuencia⁶¹. No obstante, las memorias hacen referencia a que, en algunos centros de las poblaciones rurales – es el caso de los colegios de San Buenaventura de Lluçmajor y Artà –

⁵⁷ Barceló Bauzà, Comas Rubí, Sureda Garcia, *Abriendo la caja negra: la escuela pública española de postguerra*, cit.

⁵⁸ AHUIB (FENMA), legajo 189, F. Cladera, Colegio de las Hermanas Trinitarias de Palma, 1940.

⁵⁹ Boletín Oficial del Estado, *Circular a la Inspección de Primera Enseñanza y Maestros Nacionales, Municipales y Privados de la España Nacional*, 8 de marzo de 1938, pp. 6154-6156.

⁶⁰ Boletín Oficial del Estado, *Ley de 17 de julio de 1945 sobre Educación Primaria*, 18 de julio de 1945, pp. 385-416.

⁶¹ Barceló Bauzà, Comas Rubí, Sureda Garcia, *Abriendo la caja negra: la escuela pública española de postguerra*, cit.

hay una disminución significativa de la asistencia durante el mes de junio. Este situación era debida a la incorporación de algunos niños a las tareas agrícolas propias de la época o a que acudían a clases especiales para preparar el acceso al bachillerato elemental⁶². Otros centros optaban por organizar ellos mismos estas clases para el examen de ingreso al bachillerato⁶³.

Muchas de las memorias hacen referencia a las cuotas que debían pagar los padres y que era condición imprescindible para asistir al centro. En una de las memorias se quiere relativizar que un cierto nivel económico fuese una condición imprescindible para ser alumno de aquellos centros. Es el caso de una memoria sobre el colegio de Montisón de Palma en la que se afirma que no solo se tenía en cuenta la cuestión económica sino también las capacidades de los alumnos «[...] si se presenta un niño con verdaderas aptitudes para el estudio, y su familia no tiene posibles para pagarle los estudios, es igualmente admitido en las clases»⁶⁴. En otra memoria relativa a este mismo centro, se nos informa de que se daba a los alumnos la opción de matricularse en régimen de internado, posibilidad que se ofrecía en muchos de los centros religiosos de Palma a los que asistían alumnos de los pueblos de la isla⁶⁵. En otros casos, como el colegio La Salle del Pont d'Inca (Marratxí), se exigía, aparte del pago de las cuotas, estar vacunado y no presentar ningún tipo de enfermedad contagiosa⁶⁶.

b) Horarios

Son pocas las memorias que nos aportan información del horario establecido en cada centro (17 de 40). Y de éstas, solo cinco nos especifican el horario concreto que se seguía cada día de la semana. Según lo expuesto había clase mañana y tarde de lunes a sábado. Se realizaban 3 horas lectivas por la mañana y tres por la tarde. Aunque podemos observar algunas variaciones entre las diferentes escuelas con la hora de entrada y salida de los centros. También remarcar que en algunos centros los jueves por la tarde no era lectivo⁶⁷.

Para la confección de los horarios, los practicantes indican que se seguían diferentes estrategias con el fin de evitar la fatiga entre el alumnado. En el caso del colegio de San Alfonso de Palma se intentaba variar el tipo de materia

⁶² AHUIB (FENMA), legajo 189, S. Amengual, Colegio de San Buenaventura de Lluçmajor, 1940.

⁶³ AHUIB (FENMA), legajo 189, G. Mesquida, Colegio de Nuestra Señora de Montisón de Palma., 1940.

⁶⁴ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montisón de Palma, 1940, p. 10.

⁶⁵ AHUIB (FENMA), legajo 191, J. Planas, Colegio de Nuestra Señora de Montisón de Palma, 1945.

⁶⁶ AHUIB (FENMA), legajo 189, A. Seguí, Colegio La Salle del Pont d'Inca (Marratxí), 1940, p. 10.

⁶⁷ AHUIB (FENMA), legajo 189, M. Ramis, Colegio de San Buenaventura de Artà, 1940; AHUIB (FENMA), legajo 191, G.A. Pulido, Colegio La Salle de Palma, 1944.

cada cierto tiempo⁶⁸. Estrategia que también se seguía en el colegio de San Buenaventura de Lluçmajor donde se limitaban a 30 minutos el tiempo para cada asignatura, colocándose las materias que requerían mayor concentración al inicio de la jornada⁶⁹.

Las liturgias y los rituales de tipo religioso y patriótico, serán algunas de las principales prácticas introducidas en la cultura escolar de postguerra, «Cantos populares e himnos patrióticos han de ser entonados por los niños en todas las sesiones de la Escuela»⁷⁰. Las memorias atestiguan el cumplimiento de estas prácticas – izada de la bandera, cánticos patrióticos – prescritas por las autoridades⁷¹. Los ejercicios de los practicantes muestran también que los principios católicos impregnaban toda la enseñanza con actividades incluidas en el horario escolar como era el caso de los rezos de oraciones y rosarios, con celebraciones concretas como el mes de María o asistiendo a celebraciones religiosas incluso fuera del horario escolar. La descripción y elogio de estas actividades ocupa un espacio muy importante en los textos de los practicantes.

c) Cuestiones curriculares (materias, contenidos y lengua de enseñanza)

La citada circular de 1938 estipulaba que la enseñanza, tanto pública como privada, se debía desarrollar en base a cuatro pilares básicos: educación religiosa, patriótica, cívica y física. En cada uno de ellos se especificarán toda una serie de pautas a seguir. Siendo las memorias un excelente testimonio para observar hasta que punto hubo correlación entre las disposiciones legislativas y la práctica escolar diaria. Algunos ejemplos de prácticas preceptuadas por las directrices oficiales a las que hacen referencia los practicantes en sus memorias son: la lectura de textos a través de los cuales se podían deducir consecuencias morales y religiosas⁷² la enseñanza de los hitos acontecidos durante la Guerra Civil⁷³, los recreos tutelados y con actividades propuestas por el maestro⁷⁴ la realización de labores y enseñanzas del hogar en las escuelas de niñas⁷⁵, la asistencia a la misa dominical⁷⁶ o el acto de izar bandera y cantar el himno nacional antes de entrar

⁶⁸ AHUIB (FENMA), legajo 190, J. Sabater, Colegio de San Alfonso de Palma, 1941.

⁶⁹ AHUIB (FENMA), legajo 191, S. Cardell, Colegio de San Buenaventura de Lluçmajor, 1944, p. 2.

⁷⁰ Boletín Oficial del Estado, *Circular a la Inspección de Primera Enseñanza y Maestros Nacionales, Municipales y Privados de la España Nacional*, cit. p. 6155.

⁷¹ AHUIB (FENMA), legajo 189, A. Fernández, Colegio de San Alfonso de Palma, 1940 y A. Veny, Colegio La Salle de Palma, 1940.

⁷² AHUIB (FENMA), legajo 189, F. Cladera, Colegio de las Hermanas Trinitarias de Palma, 1940.

⁷³ AHUIB (FENMA), legajo 189, J. Roig, Colegio de San Buenaventura de Lluçmajor, 1940.

⁷⁴ AHUIB (FENMA), legajo 191, J. Aguiló, Colegio La Salle de Palma, 1944.

⁷⁵ AHUIB (FENMA), legajo 189, M.C. Fuster, Colegio de Santa Teresa del Pont d'Inca (Marratxí), 1940.

⁷⁶ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montesión de Palma, 1940.

a clase⁷⁷. El aspecto más relevante que nos muestran las memorias es el carácter adoctrinador que tenía toda la enseñanza. Los valores patrióticos y especialmente los religiosos, en este caso, empapaban todas las materias y contenidos. Juan Palmer en su memoria sobre el colegio de Teatinos de Pollença habla que el objetivo de toda educación es el de «[...] formar un buen sentido moral, por el amor de Dios y de la Patria»⁷⁸. En la escuela de las hermanas Trinitarias de Palma analizaban gramaticalmente frases como: «la mujer española es virtuosa» o «La raza hispana es inmortal»⁷⁹. Como síntesis de este enfoque podemos recurrir a las palabras del practicante Domingo Cabot referidas al colegio de los jesuitas de Montisíon «Toda la educación está informada por el espíritu cristiano y español, conforme a las enseñanzas de Jesucristo, a las normas de la Santa Iglesia Católica y de la nueva y tradicional España»⁸⁰.

Un aspecto que nos hace ver la dificultad por aplicar algunas de las medidas es la imposición del castellano como única lengua. Prohibiéndose el uso del catalán en la escuela. De hecho, tal y como se comenta en algunas memorias, el desconocimiento de la lengua castellana por parte de muchos alumnos obligaba al maestro a utilizar el catalán como paso previo para introducir la lengua oficial, el castellano⁸¹. Otro de los practicantes afirma «Se habla el dialecto de estas Islas Baleares, [...]. A veces, al hablarles en castellano, me contestan en mallorquín, más ellos mismos rectifican al darse cuenta de que no les entiendo»⁸². Las memorias nos informan también de las materias que se impartían y que eran las prescritas por la legislación vigente.

Metodología

La información respecto a la metodología aplicada en los diferentes centros es otro de los aspectos reflejados en un gran número de memorias (34 de 40). Las memorias nos describen una metodología de enseñanza de carácter muy tradicional. Las distintas órdenes y congregaciones aplican sus usos, reglas y ratios propios. La memorización, la repetición y la enseñanza libresca son los principios en los que se inspira la enseñanza. Una afirmación de uno de los practicantes en la escuela de los jesuitas resume este enfoque muy presente en las memorias «[...] podríamos decir de esta Escuela que la repetición es el alma de la escuela de montesíon»⁸³. A pesar de ello, también encontramos

⁷⁷ AHUIB (FENMA), legajo 189, A. Fernández, Colegio de San Alfonso de Palma, 1940.

⁷⁸ AHUIB (FENMA), legajo 189, P.J. Palmer, Colegio de los Padres Teatinos de Pollença, 1940.

⁷⁹ AHUIB (FENMA), legajo 189, F. Cladera, Colegio de las Hermanas Trinitarias de Palma, 1940.

⁸⁰ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montisíon de Palma, 1940, p. 12.

⁸¹ AHUIB (FENMA), legajo 190, J. Sabater, Colegio de San Alfonso de Palma, 1941.

⁸² AHUIB (FENMA), legajo 189, S. Montelongo, Colegio de San Alfonso de Palma, 1940.

⁸³ AHUIB (FENMA), legajo 189, G. Mesquida, Colegio de Nuestra Señora de Montisíon de Palma., 1940, p. 3.

en las memorias afirmaciones de rechazo por la enseñanza memorística⁸⁴. Estas contradicciones nos muestran la confrontación entre la cultura académica o científica aprendida en la carrera y la práctica educativa real. En algunos casos encontramos referencias que aluden a alguna orientación innovadora muy poco precisa relacionada con la enseñanza activa o intuitiva. La aplicación de los métodos intuitivos consistía en trabajar mediante la observación directa los contenidos previamente trabajados en clase (plantas, animales, minerales, entre otros). Siendo las «lecciones de cosas»⁸⁵ o las excursiones – hecho que permitía observar *in situ* lo explicado en clase⁸⁶ – alguna de las estrategias que se utilizaban. En el caso de no poder llevar a cabo la observación directa, se habla del uso de aparatos de proyección, láminas o dibujos⁸⁷. Otra de las observaciones que encontramos y que posiblemente formaba parte del discurso publicitario de la escuela privada es la aplicabilidad de los conocimientos impartidos para la vida laboral. En este sentido Mateo Ramis, del colegio de San Buenaventura de Artà, expone «[...] se procura que de las enseñanzas de clase hagan luego los alumnos aplicaciones prácticas a las cosas y negocios de su familia»⁸⁸. En la misma línea, Jorge Mut (1940) explica la importancia de preparar al alumnado acorde con su posible futuro laboral⁸⁹.

En el caso de los jesuitas se defiende con convicción las virtudes de su ratio y la utilización, de acuerdo con ella, de la emulación mediante la competición⁹⁰. Los practicantes explican como en los centros de esta orden se organizaban certámenes que consistían en el enfrentamiento entre dos equipos, Roma y Cartago. En estos concursos, cada equipo debía contestar las preguntas relacionadas con los contenidos trabajados en clase⁹¹. Otra de las estrategias seguidas en este centro, era la modificación del orden establecido en la lista de clase. Cambiando en función del rendimiento académico y la conducta mostrada por cada alumno⁹².

⁸⁴ AHUIB (FENMA), legajo 189, M. Ramis, Colegio de San Buenaventura de Artà, 1940; A. Fernández, Colegio de San Alfonso de Palma, 1940.

⁸⁵ AHUIB (FENMA), legajo 191, G.A. Pulido, Colegio La Salle de Palma, 1944.

⁸⁶ AHUIB (FENMA), legajo 189, F. Cladera, Colegio de las Hermanas Trinitarias de Palma, 1940; AHUIB (FENMA), legajo 190, M. Lliteras, Colegio de San Buenaventura de Lluçmajor, 1941; AHUIB (FENMA), legajo 191, S. Cardell, Colegio de San Buenaventura de Lluçmajor, 1944 y L. Gomila, Colegio Beato Ramón Llull de Inca, 1945.

⁸⁷ AHUIB (FENMA), legajo 189, E. Riera, Colegio de Nuestra Señora de Montisíón de Palma, 1940.

⁸⁸ AHUIB (FENMA), legajo 189, M. Ramis, Colegio de San Buenaventura de Artà, 1940, p. 3.

⁸⁹ AHUIB (FENMA), legajo 189, J. Mut, Colegio de San Buenaventura de Lluçmajor, 1940.

⁹⁰ M. Revuelta González, *Los colegios de jesuitas y su tradición educativa (1868-1906)*, Madrid, Universidad Pontificia Comillas, 1998.

⁹¹ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montisíón de Palma, 1940; AHUIB (FENMA), legajo 191, J. Planas, Colegio de Nuestra Señora de Montisíón de Palma, 1945.

⁹² AHUIB (FENMA), legajo 191, J. Planas, Colegio de Nuestra Señora de Montisíón de Palma, 1945.

Según las memorias la mayoría de los colegios religiosos cumplían con las normas oficiales que prescribían los paseos escolares y las excursiones. A través de las excursiones, se trabajaban materias como la educación física, la historia de España, la geografía y las ciencias naturales⁹³. También se aprovechaban estas salidas para enseñar cantos populares, himnos patrióticos o hitos relacionados con la guerra que acababa de terminar. En relación a este último punto, encontramos el testimonio de J. Roig quien explica que durante una visita al submarino General Sanjurjo⁹⁴ ubicado en el Puerto de Sóller, se aprovechó para explicar la importancia que tuvieron los generales del ejército español en el golpe de Estado de 1936. Los principales lugares que se visitaban eran monumentos prehistóricos, lugares emblemáticos de la ciudad de Palma o accidentes geográficos, hecho que permitía completar los contenidos estudiados en clase. Como se ha señalado anteriormente, algunos centros dan la tarde libre de los jueves a sus alumnos⁹⁵. Hecho que contrasta con la legislación prescrita, la cual ordenaba la realización de paseos y excursiones durante ese día de la semana.

Disciplina

La mitad de los testimonios analizados (20) nos aportan información relacionada con la disciplina. Uno de los puntos que más se destacan es otro de los elementos propagandísticos de la escuela privada: el buen comportamiento presentado por los alumnos gracias a la estrecha colaboración entre familia y escuela⁹⁶. Una comunicación periódica entre los centros y las familias mediante los llamados *Boletines* garantizaba que los padres tuviesen información sobre la conducta y el rendimiento académico del alumnado⁹⁷. Otra garantía para las familias de la correcta supervisión de sus hijos por parte de la escuela eran las jornadas de puertas abiertas realizadas en algunos colegios. Éstas servían para que los padres entrasen a observar el comportamiento y rendimiento de sus hijos⁹⁸. Además de la búsqueda de la complicidad entre escuela y familia para reforzar la disciplina del alumnado, en el centro la disciplina se imponía de forma drástica y estricta. Los premios y castigos eran una práctica habitual.

⁹³ AHUIB (FENMA), legajo 189, J. Roig, Colegio de San Buenaventura de Lluçmajor, 1940; AHUIB (FENMA), legajo 190, J. Sabater, Colegio de San Alfonso de Palma, 1941.

⁹⁴ José Sanjurjo Sacanell (1872-1936), fue uno de los militares implicados en el alzamiento militar de 1936 en contra del gobierno legítimo de la Segunda República. Sufrió un accidente de avión el 20 de julio del citado año cuando se trasladaba de Portugal a España para unirse a los militares golpistas liderados por el General Franco.

⁹⁵ AHUIB (FENMA), legajo 189, M. Ramis, Colegio de San Buenaventura de Artà, 1940; AHUIB (FENMA), legajo 191, G.A. Pulido, Colegio La Salle de Palma, 1944.

⁹⁶ AHUIB (FENMA), legajo 189, S. Pedreño, Colegio La Salle de Palma, 1940.

⁹⁷ AHUIB (FENMA), legajo 189, J. Rigo, Colegio La Salle de Palma 1940 y M. de Oleza, Colegio de San Alfonso de Palma, 1940.

⁹⁸ AHUIB (FENMA), legajo 191, J. Planas, Colegio de Nuestra Señora de Montesión de Palma, 1945.

Los premios consistían en refuerzos positivos como felicitaciones en público, asignación de puntos, entrega de material escolar o sentarse en las primeras filas de la clase. La intención de estos refuerzos era estimular al resto del alumnado a actuar de la misma manera que el alumno premiado. Así pues, en el colegio La Salle de Palma se entregaban «cruces de honor» al alumnado con buena conducta y alto rendimiento y, si las mantenían durante todo el curso, pasaban a formar parte del «cuadro de honor» de la escuela⁹⁹. Similares premios eran los que se concedían en el colegio de jesuitas de Montisión¹⁰⁰. En referencia a los castigos, la mayoría de los estudiantes en prácticas explican que se basaban en reñirles en público, realización de trabajos suplementarios, estar de pie, quedarse sin patio, pago de puntos y, en caso de presentar un mal comportamiento de forma reiterada, expulsión del centro¹⁰¹. De nuevo nos encontramos aquí con la incoherencia entre el discurso académico y la práctica. A pesar de la pormenorizada descripción de premios y castigos que contienen muchas memorias, un gran número de ellas expone que la mejor disciplina es aquella que se basa en el razonamiento, rehuendo de las imposiciones y los abusos de poder¹⁰². En cuanto a los castigos corporales, la casi totalidad de los testimonios analizados rechazan su uso aunque muchos testimonios personales de alumnos de aquella época coinciden en que eran muy habituales. Encontrándose una única memoria en la que se reconoce su utilidad en según que casos¹⁰³.

Conclusiones

La primera cuestión que debemos plantearnos es la validez de la información aportada por las memorias. La respuesta sería la misma que si hiciésemos referencia a otras fuentes. Son un testimonio subjetivo del que debemos extraer e interpretar la información, contrastándola con la que se pueda obtener de otras fuentes. La extensión del artículo no permitía contrastar continuamente la información de las memorias con otros testimonios pero la interpretación que ofrecemos se ha apoyado en la de otras investigaciones que estamos haciendo, a las que hemos hecho referencia en algun caso, y sobre otras fuentes que también

⁹⁹ AHUIB (FENMA), legajo 191, A. Morales, Colegio La Salle de Palma, 1944.

¹⁰⁰ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montisión de Palma, 1940; AHUIB (FENMA), legajo 191, J. Planas, Colegio de Nuestra Señora de Montisión de Palma, 1945.

¹⁰¹ AHUIB (FENMA), legajo 191, G.A. Pulido, Colegio La Salle de Palma, 1944.

¹⁰² AHUIB (FENMA), legajo 189, S. Amengual, Colegio de San Buenaventura de Lluçmajor, 1940.

¹⁰³ AHUIB (FENMA), legajo 189, D. Cabot, Colegio de Nuestra Señora de Montisión de Palma, 1940.

dan cuenta de la práctica, como es el caso de la fotografía. En la compleja aproximación a lo que hemos llamado la cultura escolar, la literalidad del texto de las memorias nos aporta lo que sería el nivel de las normas y valores, de lo que se considera correcto o quiere publicitarse y darse a conocer. Es un nivel que no siempre es coherente con los otros dos, el del pensamiento académico-científico o el de la práctica. Estas contradicciones entre niveles de prescripción o culturas que afloran en los textos de las memorias nos ayudan a conocer el conjunto de lo que es la cultura escolar de una determinada época o centro. Es el caso por ejemplo de los castigos físicos. Mientras que la cultura científica y la teoría pedagógica los proscibía totalmente, las normas y valores aceptados en esta época, en este tipo de centros no los rechazaban del todo y su aplicación moderada no contradecía las expectativas de los padres y por esto las memorias reflejan ambigüedad sobre el tema. En la práctica por el contrario y basándonos en otros testimonios, entre ellos los personales, sabemos que los castigos físicos, incluso con una cierta crueldad eran frecuentes en esta época en los colegios privados. Como se ha indicado, lo mismo pasa con las prácticas de enseñanza donde la falta de concordancia entre el discurso teórico, el de normas, valores y expectativas y el práctico es muy grande. Las alusiones a aspectos innovadores no hacen más que intentar barnizar un tradicionalismo muy marcado que hace de la repetición y la memorización los principios básicos de la práctica educativa en estos centros. Las apelaciones que aparecen en algunas memorias a pedagogos como Pestalozzi, Herbart o Fröebel son simbólicas y una concesión al academicismo del ejercicio que se tenía que presentar para aprobar las prácticas de enseñanza, requisito indispensable para la obtención del título de maestro. Las referencias a la existencia de material Montessori en un parvulario de las monjas Trinitarias se explica por la importante influencia que tuvo esta pedagoga entre algunas congregaciones religiosas femeninas en las décadas anteriores a la Guerra Civil. En estos momentos los modernismos no están bien vistos y los padres prefieren más la garantía de adquisición de conocimientos que no modelos de educación integral. Por este motivo en las memorias, sin perjuicio de alguna apelación a los principios teóricos que debían figurar en un ejercicio académico pedagógicamente correcto, se insiste sobre todo en las prácticas tradicionales que garantizan alumnos obedientes, disciplinados y que aprenden los conocimientos.

Las memorias reflejan los discursos aceptados por los profesores que debían juzgarlas y también los que tenían los propios centros y que formaban parte de la tradición pedagógica de la congregación u orden. Recordemos que muchos de los autores de estas memorias eran clérigos y algunos relacionados con los titulares de los centros. En los textos podemos descubrir muchos de los elementos que servían para construir un discurso legitimador de la escuela privada religiosa y para reforzar su prestigio social frente a la pública: buenas instalaciones, recursos y materiales didácticos; disciplina y enseñanza de

calidad, cumplimiento de las expectativas de los padres y selección social de los alumnos.

Otra conclusión que podemos deducir es que la escuela privada de los primeros años del franquismo no es una escuela homogénea. Debemos evitar las generalizaciones simplificadoras. A pesar del gran cambio político y de orientación ideológica y educativa que supone la implantación de la Dictadura franquista la escuela privada religiosa sigue con su cultura escolar tradicional propia de cada orden y congregación. Con todas las facilidades que les aporta ahora un Estado que no intervendrá en absoluto en controlar la enseñanza privada. En los primeros años al adoctrinamiento religioso tradicional en estos centros se añadió el patriótico conservador del franquismo posiblemente más formal que real y siempre que no distorsionase el religioso o implicase sometimiento a las autoridades civiles. El peso de estas ratios o normas colegiales de las distintas congregaciones y órdenes marca el estilo de los distintos colegios al contrario de la escuela pública donde el que marcaba el carácter y la orientación de la escuela era el maestro, o maestros, que las regentaba.

Las memorias de los alumnos que se forman para ser maestros es una buena fuente para conocer la historia de la educación y para aproximarnos a la cultura escolar más cotidiana pero lo son especialmente para comprender en una época determinada que prácticas y que ideas educativas estaban aceptadas y como se articula el discurso académico, con el ideal y el empírico.

Die Deutsche Schule in Rom. Ein Beitrag zur Geschichte der deutschen auswärtigen Kulturpolitik in Italien

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The German School in Rome. A contribution to the history of German foreign cultural policy in Italy

ABSTRACT: Because of the Pope's veto the prussian legate Bunsen couldn't found a school for the German Protestants of Rome. They must wait for Italy's unification. With the help of the German government the supporters of interconfessional education succeeded to build an interconfessional school (1903-1904). Medium of the cultural diplomacy its aims didn't change during the republic of Weimar. The NSDAP tried to dominate over the school, but because of the rivalry between NSDAP, ministry of foreign affairs and ministry of education the school could maintain a certain liberal character, so jewish pupils were not excluded. After the Second World War the German catholics opened a little school in 1949, but in 1950 catholics and protestants together decided to open an interconfessional school. Since 1975 the final examinations are recognized in Italy and Germany. More than 50% of the 900 pupils are Italians.

EET/TEE KEYWORDS: History of School; Cultural diplomacy; Confessionalism; Nationalism; International meetings; Italy; XXth Century.

1. *Die deutschen Schulen in Rom vor dem Ersten Weltkrieg im Zeichen von Konfessionalismus und Nationalismus*

1.1. *Einleitung*

Die deutschen Schulen in Italien¹ stellen einen beachtlichen Bestandteil deutsch-italienischer Kulturbeziehungen der letzten beiden Jahrhunderte dar.

¹ Gab es vor dem 1. Weltkrieg ca. 13 deutsche Schulen in Italien, so haben nur Genua, Mailand und Rom als Schulstandorte die politischen Katastrophen der beiden Weltkriege überdauert.

Wegen ihrer direkten Ausstrahlung auf ihr italienisches Publikum wird ihrer Arbeit eine erhebliche kulturpolitische Bedeutung zugemessen.

Dem steht ein recht geringes Interesse der Geschichtswissenschaft für die Auslandsschulen gegenüber², welche die Bearbeitung dieses Gegenstandes weitgehend den Schulen und ihren Geschichtslehrern überlassen hat³. Überwiegend Gründungen evangelischer Kirchengemeinden, bei denen die pädagogischen Impulse der lutherischen Reformation wirksam wurden, sollten sie eine Erziehung der Kinder der Gemeindemitglieder auf der Basis der evangelischen Lehren gewährleisten, was bei einem katholischen Umfeld in einem Zeitalter sich wieder verstärkender konfessioneller Konflikte⁴ eine Herausforderung darstellte. In dieser Hinsicht war die deutsche Schule, genauer: waren die deutschen Schulen in Rom, der Hauptstadt des Kirchenstaates und Sitz des universalen Papsttums, besonderen Schwierigkeiten ausgesetzt.

1.2. Vor- und Frühgeschichte

Schon die erste Initiative des preußischen Gesandten Bunsen, erstmals 1835 vorgetragen, hatte einen konfessionspolitischen Hintergrund. Ähnlich wie bei seiner Hospitalgründung auf dem Kapitol, deren Hintergrund die Bekehrungsversuche bildeten, denen Protestanten in römischen Krankenhäusern ausgesetzt waren, sollte eine Elementarschule gemäß den preußischen Lehrplänen für die Kinder protestantischer Handwerker und Künstler errichtet werden, die sich keinen Hauslehrer leisten konnten. Sie sollte gewährleisten, dass die Kinder in ihrem protestantischen Glauben nicht gefährdet wurden⁵. Die Schulgründung war nicht wie der Gottesdienst in der Gesandtschaftskapelle vom Gesandtschaftsrecht auf freie Religionsausübung gedeckt und erregte aus Sicht der Kurie besonderen Anstoß. Die Beziehungen zwischen dem Vatikan und Preußen waren damals durch die *Kölner Wirren*, vornehmlich dem Streit um die Frage der *Mischehen* zwischen Katholiken und Protestanten gespannt, wobei Bunsen durch seine Informationspolitik gegenüber der Kurie so sehr

² Nach B. Müller, *Von den Auswandererschulen zum Auslandsschulwesen. Ein Beitrag zur Geschichte des deutschen Nationalismus vor dem Ersten Weltkrieg*, Diss. Würzburg 1995, p. 3, hat zuletzt J. Waibel, *Die deutschen Auslandsschulen – Materialien zur Außenpolitik des Dritten Reiches*, Diss. Frankfurt (Oder), 2012, s. 9, auf diesen Tatbestand verwiesen.

³ Mailand (1986), Genua (1994), Rom (2001) und Venedig (2013) haben aus Anlass von Jubiläen ausführliche, teilweise auch auf Archivstudien basierende Darstellungen ihrer Geschichte erfahren.

⁴ O. Blaschke (Hg.), *Konfessionen im Konflikt. Deutschland zwischen 1800 und 1970: ein zweites Konfessionelles Zeitalter*, Göttingen, Vandenhoeck & Ruprecht, 2002.

⁵ A.-D. Esch, *Anfänge und Frühgeschichte der deutschen evangelischen Gemeinde in Rom 1819-1870*, «Quellen und Forschungen aus italienischen Archiven und Bibliotheken», vol. 75, 1995, pp. 366-426; G. Vesper, *Die Deutsche Schule Rom. Konfessionalismus, Nationalismus, Internationale Begegnung*, Husum, Matthiesen, 2011, pp. 16-33.

an Glaubwürdigkeit eingebüßt hatte, dass er 1838 abgelöst werden musste. Preußen befließigte sich danach fast drei Jahrzehnte äußerster Zurückhaltung bezüglich einer deutschen Schule in Rom. In Neapel hingegen konnte die evangelische deutsch-französische Gemeinde durch die Unterstützung des preußischen Gesandten Graf Bernstorff 1839 die Gründung einer evangelischen Schule vornehmen⁶.

Die im Oktober 1863 auf Anregung des österreichischen Botschaftssekretärs Gravenegg an der Anima eingerichtete deutsche katholische Schule stieß naturgemäß auf keinen konfessionspolitisch begründeten Widerstand in Rom. Freilich musste sie – vermutlich als Folge der in Italien eingeführten allgemeinen Schulpflicht und des von den Kommunen kostenlos angebotenen Elementarunterrichts – schon 1878 wegen zurückgehender Schülerzahl ihre Tätigkeit einstellen.

Seit Bunsens Schulplänen fanden römische Schulfragen in der deutschen Öffentlichkeit stets eine beachtliche Aufmerksamkeit. Wichtige Entwicklungsschritte, vor allem die Kontroversen wurden von der deutschen, gelegentlich auch italienischen Presse lebhaft diskutiert. So hatte der Erfolg der Schulgründung in Neapel einen bemerkenswerten Artikel in der Augsburger *Allgemeinen Zeitung*⁷, dem damals in den gebildeten Kreisen Deutschlands am meisten verbreiteten Blatt, mit dem Titel *Die deutschen Stiftungen in Rom* zur Folge. Mit der die katholische Seite gewiss provozierenden Begründung, dass die noch existierenden Stiftungen der Nationalkirche *S. Maria dell' Anima*, des *Campo Santo* und von *S. Elisabetta dei Fornari* vorreformatorische Einrichtungen waren und 1806 nach kanonischem Recht zweifelhaft von den deutschen Regierungen Österreich überlassen worden seien, hätten deutsche Protestanten und Katholiken gleiche Ansprüche auf dieses Erbe. Aus dem Vermögen der Stiftungen könne man endlich einmal in Rom eine deutsche Schule errichten. 1844 habe es in Rom 134 deutsche Kinder unter 12 Jahren gegeben, «welche in den mangelhaften italienischen Lehranstalten mit der Sprache auch ihre angestammte Gesittung verlernten. Warum konnte die preußische Regierung (korrekt hätte der Verfasser des Artikels die evangelische Gemeinde als Gründer angeben müssen) in Neapel, sogleich als sich das Bedürfnis zeigte, für eine weit geringere Zahl schulpflichtiger Kinder eine treffliche Bildungsanstalt errichten, und dadurch auch für ihre Kinder in der Fremde nationale Erziehung sichern?»⁸. Die preußische Regierung behielt aber vorerst ihre Zurückhaltung

⁶ E. Schubert, *Aus der Geschichte der evangelischen Gemeinde deutscher Sprache in Neapel*, Neapel, Richter, 1926, pp. 39-41.

⁷ Beilage zu Nr. 211 der *Allg. Zeitung*, 29.7.1852, pp. 3-370.

⁸ War das Infragestellen der Eigentumsrechte an den Stiftungen sicher eine Herausforderung für die katholische Seite, so zeigen die Bemerkungen zur Konfessionszugehörigkeit des preußischen Gesandten in Rom oder auch über einen „*priesterlich eifernden Verfasser*“ eines Kölner Zeitungsartikels, dass das konfessionelle Klima gegenüber dem 18. Jahrhundert und auch noch den Zeiten eines Humboldt sich verschärft hatte, deuten sich hier bereits die Auseinandersetzungen des

in der Schulfrage bei und gestattete ihrem Gesandtschaftsprediger nur, am Privatunterricht seiner Kinder auch andere Kinder der Gemeinde teilnehmen zu lassen.

Erst die politische Einigung eines großen Teils Italiens und die prekäre Lage des Kirchenstaates brachte Bewegung auch in die Schulfrage. Der Gesandtschaftsprediger Hermann von der Goltz stellte erstmals 1862 die Errichtung einer regulären Schule als Notwendigkeit heraus, vertrat dabei die Meinung, dass in der damaligen politischen Situation von Seiten des Papstes keine Widerstände zu erwarten seien. Berlin lehnte seine weitgehenden Pläne ab, unterstützte aber die 1861 vom Schweizer Pfarramtskandidaten Wirz eröffnete Privatschule mit Mitteln aus dem vom preußischen Kultusministerium verwalteten *Catel-Fonds*⁹, der Bestandteil des Fonds der preußischen Gesandtschaftskapelle war. Die Schülerschaft sowohl der evangelischen als auch der katholischen Schule setzte sich überwiegend aus Kindern von Handwerkern und Künstlern zusammen.

Einen qualitativen Sprung bedeutete dann die Zusage des preußischen Gesandten Arnim, der Privatschule im Gesandtschaftsgebäude, dem *Palazzo Caffarelli* auf dem Kapitol, Räume zur Verfügung zu stellen und damit den Weg zur Eröffnung einer deutschen evangelischen Privatschule auf dem Kapitol am 11.11.1867 freizumachen. Für diese Auflockerung der preußischen Haltung und auch das Ausbleiben einer päpstlichen Reaktion dürfte in erster Linie die veränderte politische Situation nach 1866 verantwortlich sein.

Die italienische Einigung hatte auch den Weg für die Gründung der *Internationalen Schule protestantischer Familien* in Mailand geebnet. Dort hatte der Pfarrer Kind der 1850 gegründeten, überwiegend aus Deutschen und Schweizern bestehenden protestantischen Gemeinde den gleichen Weg wie der römische Pfarrer Heintz eingeschlagen und mit Genehmigung der Regierung des lombardisch-venezianischen Königreichs seinen Kindern, aber auch den Kindern einiger Ausländer, Unterricht erteilen lassen. Pfarrer Kind strebte darüberhinaus eine regelrechte Schulgründung an, der Kirchenvorstand lehnte aber am 2.5.1855 seine Pläne ab, da «das Interesse der Gemeinde verlange, die von einer Erweiterung der durch die Behörde gewährten Konzession abzusehen»¹⁰. Auch hier dürfte die Furcht vor restriktiven Maßnahmen der habsburgischen Herrschaft den Gemeindevorstand bewogen haben, von der regelrechten Gründung einer protestantischen Schule Abstand zu nehmen. Für diese Sicht spricht, dass bald nach dem Ende der österreichischen Herrschaft in

Kulturkampfes und der ihm folgenden Jahrzehnte an. Auch dass die evangelische Schulgründung eine nationale Erziehung sichern soll, weist auf nationalprotestantisches Denken hin.

⁹ Der Maler Franz Catel hatte 1820 der evangelischen Gemeinde 500 Taler geschenkt, deren Zinsen zur Unterstützung hilfsbedürftiger preußischer Untertanen dienen sollten. Diese Stiftung bildete später den Grundbestandteil des *Fonds der Preußischen Gesandtschaftskapelle*.

¹⁰ K. Gruhn, *Die Geschichte der Schule. Schule in der Geschichte*, in: *Deutsche Schule Mailand 1886-1986*, Festschrift zum hundertjährigen Bestehen, Bozen, 1986, pp. 12-53, bes. p. 15.

der Lombardei die Versammlung der protestantischen Gemeinde die Gründung einer Schule beschlossen hat, die schon am 10.12.1860 mit drei deutschen Kindern und einem französischen eröffnet wurde.

1.3. Die Schule auf dem Kapitol (1867-1904)

Hatte die besondere konfessionelle Exposition in Rom eine fast 30-jährige Genese der Kapitolschule zur Folge, so unterschied sich diese auch in der formalen Gestaltung von anderen deutschen Auslandsschulen. Da es in Rom seit 1838 keine evangelische Gemeinde und somit keinen Gemeindevorstand geben durfte, der als Schulvorstand hätte fungieren können, stand die Schule unter der Aufsicht des Gesandtschafts- bzw. Botschaftspredigers, der sich um die Lehrereinstellung und die Finanzierung kümmerte. Als Lehrer wurden teils in Lehrerseminaren ausgebildete Lehrer, teils Kandidaten der Theologie herangezogen. Erstere boten den Vorteil einer pädagogischen Professionalität für den Elementarschulbereich und auch einen möglichen längeren Beschäftigungszeitraum, Letztere konnten dem in Rom stets vorhandenen Bedürfnis nach einer humanistischen Grundausbildung (Lateinunterricht) eher entsprechen und bei Bedarf den Pfarrer vertreten, verließen Rom aber in der Regel nach zwei Jahren.

Die Schule hatte fast durchgehend mit finanziellen Problemen zu kämpfen. Als Einnahmen standen neben relativ geringen Schulgeldzahlungen, den Zinsen aus dem *Catel-Fonds* und die Stiftung der Malerin Schwanefeld (1867), Zahlungen des *königlichen Dispositionsfonds*, ab 1873 Dispositionsfonds des Kaisers, 1878 aus dem neu errichteten *Schulfonds des Auswärtigen Amtes* zur Verfügung. Freilich hielt die finanzielle Unterstützung der Auslandsschulen nicht mit deren stürmischer Entwicklung Schritt. Den zahlreichen Neugründungen nach 1866/70¹¹ stand ein seit 1878 bis zum Ende der Kanzlerschaft Bismarcks nicht mehr erhöhter *Schulfonds* gegenüber¹².

In den 1870er Jahren ist auch eine allmähliche Wandlung des Schulziels festzustellen: Die Unterstützung mit Reichsmitteln wurde damit begründet, «daß die Erhaltung der Schule im deutschnationalen Interesse dringend wünschenswerth erscheint»¹³. Die Erhaltung des Deutschtums, das nationale Interesse an der Unterhaltung der Schule hatte das konfessionelle Motiv der Sicherung des evangelischen Glaubens der Kinder im Rang übertroffen.

¹¹ In Italien zunächst Genua (1869), dann Florenz (1874?), Venedig (1877-84, dann wieder ab 1890), Mailand (1886), Palermo, Messina, Bari, San Remo, Saronno (1912).

¹² 1878/79 lag die Eingangsdotierung des Schulfonds bei 75.000 Mark, zwischen 1880 und 1890 wurden jährlich 60.000 Mark ausgewiesen. B. Müller, S. 143.152ff. Mit der Errichtung des Schulfonds und seiner Ansiedlung im AA war es Bismarck gelungen, den Einfluss des *Evangelischen Oberkirchenrats* auf das Auslandsschulwesen einzudämmen. B. Müller, pp. 132

¹³ Bundesarchiv Berlin, R901-70153. 29.7.1874. Dazu Vesper, pp. 61.

Nationales bis nationalistisches Denken im Umfeld der Einigungskriege von 1859/60 über 1866 bis 1870/71 hat auch in den anderen evangelischen Gemeinden Italiens verstärkt Einzug gehalten und auf die Schulentwicklung deutscher Schulen eingewirkt. War im jetzt konstitutionellen Italien das Recht auf freie Religionsausübung gewährleistet und sogar der Bau eigener Kirchen möglich, so zerfielen die Gemeinden nun in einen französischen und einen deutschen Teil, in Neapel wurde so auch die deutsch-französische Schule geschlossen und eine deutsche Gemeindeschule errichtet. In Genua kam es 1868 fast gleichzeitig mit Neapel zur Trennung der lutherischen Christen von der *Église protestante réformé de Gènes* und ein Jahr später zur Gründung der Deutschen Schule Genua. In Florenz erfolgte eine solche Teilung der Gemeinde 1899. Das Konzept der 1820er Jahre, als sich sprachlich, national und auch konfessionell (lutherisch bzw. reformiert) unterschiedliche Gruppen zu einer Gemeinde zusammenschlossen, ließ sich in der nationalistisch aufgeheizten Stimmung der 1860er Jahre kaum mehr durchsetzen.

Als das Reich 1887 mit der Begründung des zu geringen Anteils an deutschen Schülern der Kapitolschule den Zuschuss des *Schulfonds des Auswärtigen Amtes* strich¹⁴, kamen ihr der *preußische Evangelische Oberkirchenrat* und die evangelischen Vereine (*Gustav-Adolf-Verein, Evangelischer Bund*) zu Hilfe.

Der nach 1896 erfolgte Aufschwung der Schule vollzog sich vor dem Hintergrund einer Neubewertung des Auslandsschulwesens in der wilhelminischen Epoche. Insbesondere der *Alldeutsche Verband* propagierte die Förderung der Auslandsschulen, da sie als wirksames Mittel für die Erhaltung des Deutschtums im Ausland angesehen wurden. Bernhard von Bülow, vorher Botschafter in Rom, unterstützte diesen Gedanken sowohl als Staatssekretär als auch als Reichskanzler mit Nachdruck. Als entscheidendes Datum ist die Orientreise Wilhelms II. 1898.

festzuhalten, bei der der Kaiser in Begleitung Bülows eine Reihe deutscher Schulen besuchte. Damals wurde eine Forderung der Alldeutschen, die prestigeträchtige Erteilung der *Militärberechtigung* an Auslandsschulen, deren Abschlüsse damit den deutschen Abschlüssen gleichgestellt wurden, erstmals in Konstantinopel realisiert. Mit der Neubewertung ging ein stärkeres finanzielles Engagement des Reiches einher. Die schrittweise Aufstockung des Schulfonds von 60.000 (1892) auf 400.000 Mark (1903) kam auch der Schule auf dem Kapitol zugute. Eine Folge war eine stärkere Einflussnahme des Reichs auf die Auslandsschulen, wofür die Errichtung des Schulreferats im *Auswärtigen Amt* (1906), das dem Leiter der Deutschen Schule in Bukarest, Franz Schmidt, übertragen wurde, ein deutliches Indiz darstellt. Das Reich hatte aber schon vorher durch die Vermittlung von Lehrern und Entsendung von Schulaufsichtsbeamten lenkend in das Auslandsschulwesen eingegriffen. In der Wilhelminischen Zeit trat zu den erwähnten konfessionellen und patriotischen

¹⁴ Zur keineswegs kohärenten Begründung vgl. Vesper, pp. 77-81.

Zielen der Auslandsschulen noch ein missionarischer, kulturimperialistischer Gedanke hinzu: Die Schulen sollten durch die Verbreitung von deutscher Sprache und Kultur an der Durchsetzung von Deutschlands Anspruch auf Weltgeltung mitwirken. Deutschland sollte auch bezüglich seiner Auslandsschulen nicht hinter Frankreich und England zurückstehen.

Das in Bezug auf die Auslandsschulen sich wandelnde Klima in Berlin traf auf eine insgesamt positive wirtschaftliche Entwicklung in Deutschland und in Italien in den letzten beiden Jahrzehnten vor dem Ersten Weltkrieg. In Venedig und im Süden von Mailand zog u.a. die dort aufblühende Glasindustrie deutsche Fachkräfte an, die die Nachfrage nach deutschen schulischen Angeboten verstärkten und 1886 die Gründung der deutsch-italienischen Volksschule im Süden von Mailand¹⁵ sowie der in zwei Anläufen errichteten deutschen Schule in Venedig (1877-84 und ab 1890) zur Folge hatten¹⁶. In Genua, traditionell mit Deutschland, vor allem dem süddeutschen Raum wirtschaftlich eng verbunden, verneunfachte sich zwischen 1881 und 1890 der Handel mit Deutschland, deutsches Kapital und Technologie waren an der Entwicklung einer modernen Infrastruktur im Hafen von Genua beteiligt¹⁷. In Rom, Venedig und im Golf von Neapel förderte auch der wachsende Tourismus die Nachfrage nach Arbeitskräften im Dienstleistungssektor¹⁸. So konnte in den deutschen Schulen in Italien um die Jahrhundertwende ein erheblicher Anstieg der Schülerzahlen registriert werden.

1.4. *Der Schulstreit – Kulturkampf in Rom*

Bismarck hatte den Kulturkampf beigelegt, in der deutschen und eben auch in der romdeutschen Gesellschaft wurde er weitergeführt und manifestierte sich zunächst im Kirchen- und dann im mit ihm zusammenhängenden Schulstreit. Als *Streit* wurde er überwiegend innerkonfessionell unter den Evangelischen der Kolonie ausgetragen, wobei sich prononciert antikatholische Nationalprotestanten¹⁹, die den Nationalgedanken bis zur Gleichsetzung von

¹⁵ Gruhn, *Die Geschichte der Schule. Schule in der Geschichte*, in: *Deutsche Schule Mailand 1886-1986*, cit., pp. 19-31.

¹⁶ M. Schleissner-Bier, *Die Deutsche Schule in Venedig – ihre Relation zur ev.-luth. Gemeinde A.C., Venedig*, Pietrobon, 2013.

¹⁷ G. Doria, *Le relazioni economiche tra Genova e la Germania: una storia durata sette secoli – 700 Jahre wirtschaftliche Beziehungen zwischen Genua und Deutschland*, in *Centocinquante anni di storia. Deutsche Schule Genua 1869-1994*, Genova, s.e., 1994, s. 14-20 (ital.), pp. 21-28 (deutsch).

¹⁸ Im römischen Kirchen- und Schulstreit sollte der Anführer der Nationalprotestanten, der Kaufmann Ulrich Holtz, diese Gruppe zur Mehrheitsbeschaffung in Gemeindeversammlungen benutzen.

¹⁹ Der Begriff *Nationalprotestantismus* geht zurück auf Th. Nipperdey, *Religion und Gesellschaft: Deutschland um 1900*, «Historische Zeitschrift», vol. 246, 1988, pp. 591-615.

evangelisch und deutsch adaptierten, und eine reichsnationale, auf Ausgleich mit den Katholizismus eingestellte evangelische Gruppierung überwiegend der Botschaft und der wissenschaftlichen Institute gegenüberstanden. Entzündet hatte sich der Streit an dem erstmals im Lutherjahr 1883 vom damaligen Botschaftsprediger Rönneke vorgetragenen Plan der Errichtung einer *Lutherkirche* in Rom, der an diesem Ort gewiss provozierenden Charakter hatte. Die Kirchenbaupläne sollten eine tiefe Spaltung der Evangelischen in Rom herbeiführen. Kirchenbauskeptiker wie der Archäologe Hülsen und Botschafter Bülow sahen kein Bedürfnis für einen Kirchenbau und stellten neben anderen Projekten für die Diakonissen und das Hospital eine Förderung der Schule als dringlicher heraus.

Ausgangspunkt des die deutsche Kolonie in Rom erschütternden Schulstreits war die Trennung des zweiten Lehrers Lorenz (und eines großen Teils seiner Schüler) von der Kapitolschule, wozu ihn Differenzen mit dem Schulleiter Kobelt wie auch Unzufriedenheit mit der Gehaltssituation veranlasst haben. Ein Mangel der alten Schule war ihre umständlich zu erreichende Unterkunft auf dem hinteren Teil des Kapitols. Hauptschwachpunkt aber war ihre Konfessionalität. Die deutschen Katholiken blieben der Schule meist fern, was vom nationalen Standpunkt aus beklagt wurde. Weiterhin litt die Schule unter einem Mangel an Kontinuität im Lehrpersonal, weil insbesondere die Pfarramtskandidaten Rom in der Regel nach zwei Jahren verließen. Da seit seiner Bildung 1899 der Gemeindevorstand auch als Schulvorstand auftrat, wirkten sich die Gemeindef konflikte, insbesondere die Streitfrage um den Bau der evangelischen Kirche in Rom, auch auf die Schule aus. Die nationalprotestantischen Intentionen liefen der Reichspolitik entgegen, die auf einen Ausgleich mit den Katholiken zielte und sich während der heißen Phase des Schulstreites zudem auf die Zusammenarbeit mit dem Zentrum stützte. Interkonfessionalität wurde aber auch von wichtigen Promotoren des Auslandsschulwesens vor dem Ersten Weltkrieg vertreten.

Nach der Visitation der deutschen Schulen in Italien durch den Geheimen Regierungsrat aus dem preußischen Kultusministerium, Adolf Matthias, und unter dem Eindruck der drastisch gesunkenen Schülerzahlen der *Kapitolschule* unterstützten Konsul Schnitzler, Botschafter Monts und Reichskanzler Bülow das Modell der interkonfessionellen Schule und regten die Bildung eines Schulvereins als Träger der von Lorenz gegründeten Schule an.

Bei der Gründung des Schulvereins (1904) ist man mit der Schaffung von Eltern 1. und 2. Klasse durch die Beschränkung des Stimmrechts auf reichsdeutsche Schulväter und der Besetzung des Schulvorstands ausschließlich durch Reichsdeutsche weit über die Vorgaben des Reichskanzlers hinausgegangen, um den Einfluss des Hauptvertreters der Kirchenbaufreunde, des Kaufmanns Holtz, auf die Schule zu verhindern. Dieser hatte in den 1890er Jahren in Rom einen Zweigverein des *Evangelischen Bundes* gegründet und war italienischer Staatsbürger. Neben den ausschließenden Satzungsbestimmungen wurden in

Presseveröffentlichungen die Bestimmungen zur Parität (zwischen Protestanten und Katholiken) angegriffen und dabei sehr verzerrt wiedergegeben. So flossen der Gründung einer neuen evangelischen Schule auf dem für den Kirchenbau vorgesehenen Grundstück die Sympathien und finanzielle Unterstützung der nationalprotestantischen Vereine und zunächst auch des *Evangelischen Oberkirchenrats* zu. Persönliche Ambitionen und Rivalitäten zwischen den Romkorrespondenten großer deutscher Zeitungen gaben dem Streit eine zusätzliche Dimension.

Im Kielwasser des Streits gründeten 1904 klerikale katholische Kreise eine deutsche katholische Schule, die aber keinen nennenswerten Erfolg hatte und 1907 wieder aufgegeben wurde. Besonders dem Wirken des stellvertretenden Vorsitzenden des Schulvereins, des Katholiken Hans von Zwehl, wurde zugeschrieben, dass der paritätischen Schule von Seiten des Vatikans keine Hindernisse in den Weg gelegt wurden. Der Papst selbst hat 1904 keine Anstalten getroffen, den deutschen Katholiken den Besuch der interkonfessionellen Schule zu untersagen.

Die evangelische Schule war vor allem durch ihre italienischen Schüler deutlich internationaler zusammengesetzt als die paritätische Schule, entsprach dadurch eher einer Begegnungsschule für die unteren Jahrgangsstufen und zielte mehr auf eine Volks- und Mittelschulbildung. Ihr Lehrer Walter Weber hatte speziell auf die Bedürfnisse der Schüler mit Defiziten im Deutschen Italienisch wurde ab dem 1. Schuljahr unterrichtet ausgerichtete organisatorische und didaktische Maßnahmen ergriffen und getrennten Unterricht für etwa ein halbes Jahr für die nichtdeutschen Schüler in Fächern wie Geschichte eingerichtet, wo der Lehrervortrag eine große Rolle spielte. Weber wollte der Italienisierung deutscher Schüler entgegenwirken, ohne dass diese Nachteile in ihrem schulischen und beruflichen Werdegang in Italien zu befürchten haben sollten. Die evangelische Schule war auch durch ihren Kindergarten attraktiv, da das große Kirchenbaugrundstück sehr gute Spielmöglichkeiten bot.

Die Vertreter der evangelischen Schule provozierten aber einen Umschwung in der Haltung ihrer bisherigen Förderer in Deutschland, als sie auf dem Kirchenbaugrundstück ein massives Schulhaus errichten sowie die Schule auf die Gemeinde übernehmen wollten und dann übernahmen und zur Realisierung dieser Pläne die Verwendung der in Deutschland gesammelten Kirchbaugelder forderten. Damit wäre aber der inzwischen gegen die politischen Widerstände gesicherte Kirchenbau verzögert worden. In den juristischen Auseinandersetzungen um das Kirchenbaugrundstück stand ein Sieg des *Evangelischen Oberkirchenrats* über die Holtz-Partei zu erwarten, was Letztere zum Eingehen auf einen schon 1906 angebotenen Kompromiss veranlasste, freilich auch die Hoffnungen bzw. Befürchtungen auf ein Fortleben der evangelischen Schule nicht versiegen ließ und die Kritik der Anhänger der Schulvereinsschule vom Reichskanzler bis zum Schulvorstand hervorrief. Allmählich, auch durch den Druck des *Auswärtigen Amtes* auf den Oberkirchenrat, der diesen Druck auf die evangelischen Vereine

übertrug, versiegten die deutschen Gelder für die evangelische Schule, so dass es 1909 zu einer Vereinigung der beiden Schulen kam. Hierzu hatten auch vermittelnde Gespräche Franz Schmidts Hilfestellung geleistet, der schon 1907 eine Änderung der ausschließenden Satzungsbestimmungen empfohlen hatte. Der positive Eindruck der ersten Einjährigenprüfung der Schulvereinsschule 1909 hat nach den Äußerungen Schmidts ebenfalls zur Aufgabe der Anhänger der evangelischen Schule beigetragen.

1.5. Die deutsche *paritätische* Schule

Die paritätische Schule, in welcher in der Tat sich der Anteil der evangelischen und katholischen Schüler die Waage hielt und die einen höheren Anteil an deutschsprachigen Schülern als die evangelische Schule hatte, setzte sich zum Ziel, neben der Volksschulbildung auch die Ziele der höheren Schulen in ihren verschiedenen Varianten anzubieten. Die Erreichung der Militärberechtigung wurde ebenfalls als Ziel anvisiert. Beide Zielsetzungen wurden 1905/06 fassbar. Dieses Bemühen führte zunächst zu einer äußerst komplizierten Lehrplan- und Stundentafelgestaltung, die von den deutschen Stellen deutlich kritisiert wurde.

Als Nachfolger für den 1906 ausscheidenden Lorenz griff man dann auf Philologen (Dr. Michaelis und Dr. Bohner) als Schulleiter zurück. Michaelis verließ im Unfrieden kurz vor der ersten *Einjährigenprüfung* die Schule. Der Konflikt hatte sich zwar an seiner fehlenden Oberlehrerprüfung entzündet, hatte aber auch ungeklärte Kompetenzfragen als Hintergrund. Das Verhältnis von Michaelis zum Lehrerkollegium war ebenfalls nicht konfliktfrei.

Bei der Einstellung eines Nachfolgers stellte sich, wie zuvor schon bei der eines Mittelschullehrers, das Problem, dass sich die Schule zur Zahlung von Gehältern, wie sie das *Auswärtige Amt* für angemessen hielt, nicht in der Lage sah. Das *Auswärtige Amt* willigte schließlich ein, dass der hauseigene Oberlehrer Dr. Bohner, der die Hauptlast der Arbeit nach dem Ausscheiden Michaelis' getragen und die Vorbereitung der *Einjährigenprüfung* übernommen hatte, die Schulleiterstelle antreten konnte. Er begnügte sich mit einem Gehalt, welches das Gehaltsgefüge an der Schule nicht sprengte. Der Schulreferatsleiter im *Auswärtigen Amt*, Franz Schmidt, hatte die Prüfung 1909 abgenommen, die Schule dabei einer erneuten Visitation unterzogen und aufgrund seiner positiven Erfahrungen die Zustimmung zur Lösung Bohner gegeben. Auf die Anerkennung als Anstalt mit *Militärberechtigung* musste die Schule freilich noch bis 1913 warten, als die Lehrplanvereinfachungen – die Schule wurde als Oberrealschule organisiert – und Raumprobleme (Kauf eines Schulhauses) gelöst waren. Letztere waren durch die Vereinigung mit der evangelischen Schule unaufschiebbar geworden, welche die Schülerzahl auf über 100 hatte anwachsen lassen. 1910 wurde das Haus *via Zucchelli* 16 erworben. Da der Schulverein nicht rechtsfähig war, nahm er das Angebot des Schulvereinsvorsitzenden, des

Bankiers Nast-Kolb, an, das Haus auf seinen Namen zu kaufen und die fehlenden Gelder zu einem Zinssatz von 4% vorzuschießen. Die vom Schulverein nun angestrebte Rechtsfähigkeit, vom Bundesrat am 11.5.1911 erteilt, setzte eine Neufassung der Satzung voraus. Die neue Satzung ließ nun bis zu einem Drittel Nichtreichsdeutsche als Mitglieder in der Generalversammlung zu. Im auf 7 Mitglieder erweiterten Vorstand mussten nur noch 5 die Staatsangehörigkeit des Deutschen Reichs besitzen. Die beiden Vorsitzenden sollten verschiedenen Glaubensgemeinschaften angehören, was auch die jüdischen Mitglieder nicht von der Vorstandsleitung ausschloss. Durch ein Dekret des italienischen Königs erhielt die Schule auch von italienischer Seite das Recht zugesprochen, das Grundstück *via Zucchelli* 16 zu erwerben.

Die innere Ausgestaltung der Schule wurde durch eine *Dienstanweisung für das Lehrerkollegium der Deutschen Schule in Rom* fortgeführt, welche als Präzisierung der Schulordnung von 1908 die Kompetenzen von Schulverein, Schulvorstand, Direktor und Lehrern regelte. Sie schrieb auch Toleranz bezüglich anderer Religionen und Nationalitäten vor. Unbefriedigend war noch immer die Lehrerbesoldung, die auch die Presse wieder auf den Plan rief. Immerhin konnte 1912 ein Pensionsfonds eingerichtet werden. Die Schule betonte ihren deutschnationalen Charakter, nahm aber auch ausländische, vor allem italienische Kinder auf. 1910 waren von 132 Schülern nur 53 Reichsdeutsche, 69 hatten Deutsch als Muttersprache. Die Schülerzahl war zuletzt auf 186(7) gestiegen. Der Kriegseintritt Italiens auf der Seite der Ententemächte unterbrach diese Aufwärtsentwicklung der Deutschen Schule.

2. Vom Ersten Weltkrieg bis 1945

2.1. Der Wiederaufbau der Deutschen Schule Rom – Kontinuität und Restriktion

Die Unterbrechung durch den Ersten Weltkrieg stellt wiederum die Frage nach Kontinuität und Diskontinuität zwischen der Schule der Kaiserzeit und der der Weimarer Republik. Wie grundsätzlich im Auslandsschulwesen lassen sich zunächst bezüglich der Konzeption, Aufgaben und Ziele der Schule keine wesentlichen Veränderungen gegenüber der Vorkriegszeit feststellen: Der deutschnationale Charakter der Schule wurde beibehalten, Satzung und Dienstordnung für Lehrer blieben in Kraft, die Interkonfessionalität stand außer Diskussion. So darf man fragen, ob bzw. inwiefern die 1915 folgenden Jahre eine entscheidende Zäsur darstellen, Die Schule selbst sah sich in der Nachfolge der Anstalt, die sich 1903/04 bis 1909 herausgebildet hatte. Der Schulverein hatte anders als nach 1943/45 seine Tätigkeit nie völlig aufgegeben. Dagegen musste freilich eine neue Schülerschaft gewonnen und, was für die

Kontinuitätsfrage wichtiger ist, ein völlig neuer Lehrkörper aufgebaut werden. Während die Vorkriegsschule den Ausbau zur Vollanstalt in die Überlegungen einbezog, hat man sich durch die Auswahl Georg Reisingers als lediglich seminaristisch ausgebildeter Lehrer ohne Oberstufenlehrbefähigung zum Schulleiter und die Nichtberücksichtigung Bohners für dieses Amt mit einer bescheideneren Ausgestaltung der Schule begnügt. Dies minderte erheblich ihre Attraktivität, wie die Entwicklung nach der Entscheidung für den Ausbau zur *Vollanstalt* nach 1933 beweist. Reisinger bemühte sich, die Entwicklung der Vorkriegsschule fortführend, von Anfang an um die Aufnahme von Italienern, welche 1925 etwa ein Drittel der Gesamtschülerschaft stellten, bevor Mussolinis Verbot für Italiener, ausländische Privatschulen zu besuchen (1925), die Schule für längere Zeit auf den Status einer fast rein deutschen Schule zurückwarf.

Der Erste Weltkrieg hatte zunächst einen weitgehenden Zusammenbruch des deutschen Auslandsschulwesens zur Folge. Aufgrund mangelnder Möglichkeiten für eine Macht- und Wirtschaftspolitik erfuhr in der Weimarer Republik die auswärtige Kulturpolitik eine deutliche Aufwertung. Diese hatte sich besonders seit den 1890er Jahren herausgebildet. Nach 1919 wurde eine eigene Kulturabteilung im *Auswärtigen Amt* eingerichtet. Ihr zentrales Referat wurde durchgehend von ehemaligen Auslandsschulleitern (Otto Soehring, Hermann Südhof, Traugott Böhme) geleitet. Die Außenminister Stresemann und Curtius sahen die auswärtige Kulturpolitik als Deutschlands Weltgeltung *entscheidend* bestimmendes Mittel an. In dem mit Frankreich betriebenen kulturellen Wettbewerb war den Schulen die wichtigste Rolle zugeteilt.

Zu den für das Auslandsschulwesen sich publizistisch einsetzenden Persönlichkeiten zählten neben Südhof und Böhme der 1920-25 als Kultusminister in Preußen tätige ehemalige Schulleiter in Barcelona, Otto Boelitz, und natürlich Franz Schmidt. Hauptaufgabe der Auslandsschulen blieb für sie, den Deutschen im Ausland ihre Sprache und Kultur zu erhalten, ferner in den Gastländern Werbung für Deutschland zu betreiben und deutsche Kultur zu vermitteln, aber auch auf die fremde Kultur einzugehen und sich mit ihr zu befassen. Kennzeichnend für das Denken der Protagonisten des Auslandsschulgedankens ist die folgende Aussage Südhofs: «Die Aufgaben unserer Auslandsschulen haben sich gegenüber der Vorkriegszeit nicht geändert; sie sollen nach wie vor unseren Kindern ihr Volkstum erhalten suchen und fremde Kinder in die deutsche Sprache und Kultur einführen»²⁰.

²⁰ H. Südhof, *Der gegenwärtige Stand des deutschen Auslandsschulwesens*, in O. Boelitz, H. Südhof (Hg.), *Die deutsche Auslandsschule. Beiträge zur Erkenntnis ihres Wesens und ihrer Aufgaben*, Berlin usw., Beltz, 1929, pp. 29-40, zitat p. 40.

2.2. Der Ausbau der Schule zur Vollanstalt und der Einfluss des Nationalsozialismus

Die Zeit nach 1933 stand zunächst im Zeichen des vom neuen Schulleiter Döhner durchgeführten Ausbaus der Schule zur *Vollanstalt*²¹, an der 1937 das erste Abitur abgehalten werden konnte. Der starke Zustrom von Schülern machte einen Umzug vom Schulgebäude in der *via Zucchelli* in die *via Savoia* notwendig, wobei das Reich sich erheblich finanziell engagierte. Das Auswärtige Amt setzte dabei 210.000 Dollar, der Schulverein etwa 585.000 Lire aus dem Verkauf des alten Schulgebäudes (seit 1910, nach dem Ersten Weltkrieg von Italien sequestriert, 1925 der Schule als Eigentum zurückgegeben) ein.

Wie weit drang der Nationalsozialismus in die Schule ein? Im Vorstand saß schon vor der Machtübernahme der römische Ortsgruppenleiter Willis, der in der Schulfrage schon 1931 nach Angaben der Botschaft einen erheblichen Teil der Kolonie hinter sich hatte. Die Vorsitzenden Passarge, Scheffer und Bock waren Nationalsozialisten. Willis' Nachfolger in der Ortsgruppenleitung, Kirn, Langen und Fuchs waren schon per Amt Vorstandsmitglieder, der Landesgruppenleiter der NSDAP/AO Ettel als Vertreter der Botschaft. 1934 waren alle Lehrer Mitglieder der NSDAP und übten in der Mehrzahl Funktionen in der Partei und ihren Gliederungen aus. Das Bild der Lehrerschaft ist aber nicht einheitlich. Neben überzeugten Nationalsozialisten gab es eine Anzahl Lehrer, die eher aus Karrieregründen in der Partei mitwirkten. Der Landesgruppenleiter des nationalsozialistischen Lehrerbundes in Italien, Ley, erster Schulleiter nach dem Zweiten Weltkrieg, rekurrierte auf durch das deutsch-italienische Kulturabkommen frei werdende Lektorenstellen, die vorher mit überwiegend jüdischen Emigranten besetzt waren. Von einigen Lehrern ist eine distanzierte Haltung gegenüber dem Nationalsozialismus bezeugt. Zu ihnen zählte der Schulleiter, der seit 1935 zunehmend wegen seiner wenig nationalsozialistischen Einstellung in die Schusslinie der Partei geraten war. Wiederholt hat er Versuche der Partei abgeblockt, auf die innere Gestaltung der Schule Einfluss zu nehmen. Nach mehreren vergeblichen Anläufen wurde er schließlich 1942 seines Amtes enthoben, nachdem er sich unvorsichtig im Geschichtsunterricht der Oberprima zu Rommels Afrika-Feldzug geäußert hatte. Döhner hatte vor allem erfolgreich die Anwesenheit zahlreicher jüdischer und anderer Emigranten Kinder gewährleistet, woran Auswärtiges Amt und Reichserziehungsministerium keinen Anstoß nahmen. Die Schülerschaft war so international zusammengesetzt, dass übersteigertem Nationalismus und Rassismus gewisse Grenzen gesetzt waren. Ehemalige Schüler berichten von

²¹ Zum Umdenken in Rom hinsichtlich des Ausbaus hatte auch der erfolgreiche Aufbau der 1926 wiedereröffneten deutschen Schule in Mailand zur voll ausgebauten *Oberrealschule* und ihre Anerkennung als *Vollanstalt* beigetragen, an der bereits 1929 die erste Abiturprüfung stattgefunden hatte. Gruhn, *Die Geschichte der Schule. Schule in der Geschichte*, in *Deutsche Schule Mailand 1886-1986*, cit., p. 37.

einem weltoffenen Geist, der an der Schule herrschte. Noch 1944 konnte die Tochter des als Juden ausgebürgerten Ewald Rappaport ihr Abitur in Dorf Tirol machen, wohin die Schule nach dem 9.9.1943 ausgelagert worden war.

Der Fall Döhner ist ein anschauliches Beispiel für Herrschaftsausübung in der Zeit des Nationalsozialismus, insbesondere für das Konkurrenzverhalten von Partei und den verschiedenen staatlichen Institutionen. Döhner konnte sich wohl nur so lange gegen Versuche der Partei, ihn in Rom zu ersetzen, halten, weil die auf die Schule einwirkenden Instanzen Auswärtiges Amt/Botschaft, NSDAP/AO, Reichserziehungsministerium eifersüchtig auf die Wahrung ihrer Kompetenzen achteten und keine einheitliche Linie vertraten. In der Frage der Bestellung eines Landesschulbeirats hat das Erziehungsministerium sogar auf die Durchführung eines neuen Organisationsplanes für die Schulen in Italien verzichtet, als es sah, dass die Partei hier eine Gelegenheit sah, ihre personalpolitischen Vorstellungen durchzusetzen.

3. *Die Nachkriegszeit – Rekonstruktion oder Neubeginn*

3.1. *Die Gründungsphase – Konfessionsschule oder Rückkehr zur „Reichsschule“?*

Nach dem Zweiten Weltkrieg wurden bei den Bemühungen um ein Angebot von deutschem Schulunterricht wieder die Kirchen aktiv, wobei zunächst die katholische Seite mit den Promotoren Bischof Alois Hudal²², dem Rektor von *S. Maria dell'Anima*, und Professor Alois Naber von der *Gregoriana* im Herbst 1949 eine Konfessionsschule bei *S. Roberto* an der *Piazza Ungheria* errichtete und für diese Unternehmung auch eine Anschubfinanzierung des

²² Alois Hudal, Rektor von *S. Maria dell'Anima*, hatte sich in den 1930er Jahren in einer Reihe von Schriften grundsätzlich mit dem Nationalsozialismus auseinandergesetzt, akzeptierte ihn als politische Bewegung und stimmte mit ihm in den nationalistischen Zielsetzungen überein, lehnte aber dessen Rassenlehren, Antisemitismus und totalitären Anspruch ab und forderte eine Verurteilung dieser Lehren durch die Kurie. Im Krieg half er von Verfolgung bedrohten Juden, in der Nachkriegszeit Nazi-Kriegsverbrechern bei ihrer Flucht nach Südamerika. Th. Brechenmacher (Hg.), *Der Papst und die Juden. Geschichte einer unheiligen Beziehung vom 16. Jahrhundert bis zur Gegenwart*, München, C.H. Beck, 2005; D. Burkhard, *Alois Hudal – ein Anti-Pacelli? Zur Diskussion um die Haltung des Vatikans gegenüber dem Nationalsozialismus*, Zeitschrift für Religions- und Geistesgeschichte 59 (2007), S. 61-89; H. Wolf, *Papst und Teufel. Die Archive des Vatikans und das Dritte Reich*, München, C.H. Beck, 2008; K.-J. Hummel, *Alois Hudal, Franz von Papen, Eugenio Pacelli. Neue Quellen aus dem Anima-Archiv*, in Th. Brechenmacher (Hg.), *Das Reichskonkordat 1933. Forschungsstand, Kontroversen, Dokumente*, (Veröffentlichungen der Kommission für Zeitgeschichte, Reihe B, 109), Paderborn usw., Schöningh, 2007, pp. 85-113; R. u. Th. Giefer, *Die Rattenlinie Fluchtwege der Nazis. Eine Dokumentation*, Frankfurt am Main, Athenäum, 1992²; E. Klee, *Persilschein und falsche Pässe. Wie die Kirchen den Nazis halfen*, Frankfurt am Main, Fischer, 1991.

Papstes erreichte. Als Lehrer konnte auf schon früher in Rom tätige Lehrkräfte zurückgegriffen werden. Bis zum Aufbau einer Mittelschule reichende Pläne eines katholischen Schulausschusses, die ein Aufruf vom 8.6.1950 enthalten hatte, schreckte die evangelische Seite, vertreten durch Pfarrer Dahlgrün und Professor Leo Bruhns, den vormaligen Direktor der *Hertziana*, auf. Sie drohte mit der Errichtung einer evangelischen Schule, plädierte aber für eine christliche, paritätische Schule im Interesse der Kolonie. Der nationale Gesichtspunkt wie auch der finanzielle Aspekt ließen dann die katholische Seite auf die Vorschläge der evangelischen Vertreter eingehen. In Verhandlungen am 10./11. Juli 1950 erzielten Hudal, Heinemann, Kurat der *Anima*, Naber, Dahlgrün und Bruhns Übereinstimmung über die Gründung einer christlichen, paritätischen Schule mit Koedukation.

Am 19.7.1950 fand in der *Anima* die konstituierende Sitzung des Schulvereins für die neue Schule statt, der sich als Rechtsnachfolger des alten Schulvorstandes deklarierte und in dem zumindest in der Person Ewald Rappaports, 1942 als Jude ausgebürgert, ein früheres Vorstandsmitglied saß. Damit wurde bewusst eine Kontinuität hergestellt, welche auch das Ziel der Wiedergewinnung der alten Liegenschaft in der *via Savoia* im Auge hatte. Die Schule wurde ideologisch auf christliche Werte ausgerichtet. Der Rektor der *Anima*, der evangelische Pfarrer und die Religionslehrer sollten Mitglieder des Schulvorstandes werden. Der konfessionelle Proporz spielte bei der Auswahl von Schulvorstand, Schulleitung und Lehrerkollegium lange eine erhebliche Rolle. Inzwischen konnte man auch auf die Unterstützung aus Bonn und von der Kultusministerkonferenz rechnen, was vor allem die Vermittlung und Finanzierung der Lehrer betraf.

Wie nach dem Ersten Weltkrieg eröffnete die Deutsche Schule Rom als erste deutsche Schule in Italien auch in der zweiten Nachkriegszeit. Mailand (1954) und Genua (1955) folgten erst nach einem halben Jahrzehnt, in Genua waren die entscheidenden Initiativen von der evangelischen Gemeinde ausgegangen²³, in Mailand haben die Geistlichen der beiden christlichen Konfessionen, Msgr. Krey und Pfarrer Wabnitz, die *Gründung maßgeblich gefördert*²⁴. In Mailand hat aber in der vorhergehenden Zeit das von den *Schwestern Unserer Lieben Frau – Suore di Nostra Signora* geleitete, 1925 als Mädchenschule gegründete *Istituto Giulia* als schulische Auffangstation für die Kinder, auch die Jungen, der deutschen Kolonie in Mailand fungiert.

²³ *Centocinquante anni di storia. Deutsche Schule Genua 1869-1994*, cit., p. 116.

²⁴ Th. Buck, *Die Begegnungsschule in der via Legnano: Schule nach der Geschichte*, in *Deutsche Schule Mailand 1886-1986*, cit., wie Anm.11, s. 55-63, zitat p. 55.

3.2. *Die Entwicklung zum voll ausgebauten Gymnasium und die Rückgewinnung des Schulgebäudes in der via Savoia*

Die Deutsche Schule Rom begann ihre Arbeit am 6.11.1950 mit 28 (27) Schülern im evangelischen Gemeindehaus in der *via Toscana*. Erster Schulleiter wurde Dr. Hermann Ley, in Rom schon 1936-38 als Lehrer tätig. Als Lehrerin für die Grundschule wurde Eva Prüfer, ehemalige Schülerin der Deutschen Schule Rom, vor 1945 Lehrerin an der Deutschen Schule in Venedig und in Dorf Tirol, eingestellt. Die 1952 vor einem Notar niedergelegten Statuten betonten deutlich den christlichen Charakter der Schule. Das auch von Bonn favorisierte Modell der internationalen Begegnungsschule wurde zum Erfolgsmodell, wie auch die Entwicklung der Schülerzahlen zeigt, was aber auch zu ständigen Raumproblemen führte. 1954 (bis 1958) zog die Schule auf den *Monte Verde*. Für den Transport der Schüler wurden Busse eingesetzt. 1956 wurde die erste Abiturprüfung abgehalten, 1958 erfolgte die Anerkennung als *Vollanstalt*, d. h. bis zum Abitur führende Schule. Ende 1958 konnte nach schwierigen und langwierigen Verhandlungen das alte Schulgebäude in der *via Savoia* zurückgewonnen werden, womit der Wiederaufbau der Deutschen Schule Rom in der Nachkriegszeit als abgeschlossen gelten kann. Hervorzuheben ist bei diesem Prozess die beachtliche personelle Kontinuität in Schulvorstand, Schulleitung und Lehrerkollegium von der Zwischenkriegszeit zur Nachkriegszeit.

4. *Die Zeitgeschichte*

4.1. *Schulreformen und die Durchsetzung des Begegnungsschulgedankens*

Die wiedergewonnen Räumlichkeiten übten erst recht eine erhebliche Anziehungskraft aus und ließen die Schülerzahlen von 295 (1958) über 479 (1963) auf 630 (1968) und 990 (1974) ansteigen.

Erst mit dem Schulneubau in der *via Aurelia antica* (1985) konnten die Raumprobleme langfristig gelöst werden. Die Schule hatte sich inzwischen über die Unterstufe hinaus zu einer echten Begegnungsschule entwickelt, nachdem internen Widerständen zum Trotz auch die oberen Klassen für die italienischen Schüler geöffnet worden waren. Durch das Memorandum von 1975 war das Abitur seitens Italiens als italienischen Abschlüssen gleichwertig anerkannt und der Besuch der Schule bis zum Abitur auch für die Italiener erstrebenswert geworden. Bei der Übernahme der deutschen Oberstufenreform mit ihrem Kurssystem, ebenfalls 1975, war Rom zusammen mit Brüssel sogar Vorreiter unter den deutschen Auslandsschulen.

Das Anerkennungsmemorandum ist als ein einschneidendes Datum der Schulentwicklung anzusehen²⁵. Es hat zu einer erheblichen Ausweitung des Anteils von Italienern an der Schülerschaft geführt: Der Anteil der rein italienischen Schüler hat sich von 28% auf über 50% erhöht, während die Schüler, bei denen beide Eltern Deutsche sind, weniger als 20% ausmachen. Dies wiederum ermöglichte der Schule trotz Rückgangs des deutschen Anteils die Beibehaltung einer Gesamtschülerzahl von um die 900 Schülern²⁶, die den großzügigen 1985 eingeweihten Neubau mit Leben füllen. Diese Verschiebungen hatten naturgemäß erheblichen Einfluss auf die Sprachkompetenz der Schüler. Die Schule reagierte unter anderem mit der Einführung eines parallelen DaF-Unterrichts (Deutsch als Fremdsprache)²⁷, beschloss m.E. kontraproduktiv 1992 freilich auch die Einführung von Französisch neben Latein ab Klasse 7 des Gymnasiums. In einem langen Ringen hatten sich diejenigen Kräfte durchgesetzt, die eine stärkere Angleichung an deutsche Verhältnisse erstrebten. Man nahm dabei in Kauf, dass die italienischen Schüler bis zu sechs Wochenstunden weniger deutschsprachigen Unterricht hatten, in welchem vor allem in den ersten Jahren Grammatikreflexion einen Hauptteil des Unterrichts darstellt.

Das Anerkennungsmemorandum hatte vor allem Auswirkungen auf die inhaltliche Gestaltung der Schule. Neben dem Unterricht in Italienisch musste nun italienischsprachiger Unterricht auch in einigen anderen Fächern (Geschichte, Geographie und Biologie in einigen Klassenstufen sowie *filosofia* in der Oberstufe) erteilt werden. Als lokale Spezialität wird noch das Fach *Romkunde* in italienischer Sprache unterrichtet.

Der Umzug an den Stadtrand in die *via Aurelia antica* hat sich längerfristig auf die Struktur der Schülerschaft ausgewirkt. Zunächst ist Deutsche Schule stärker Stadtteilschule geworden. Sogar Mitglieder der deutschsprachigen Institutionen schicken ihre Kinder gelegentlich in die *Schweizer Schule*, weil sie ihre Wohnung im Zentrum haben und die Schweizer Schule leichter erreichbar ist.

Vor allem aber ist aus den gleichen Gründen gegenüber den 1970er Jahren der Anteil der anderen Ausländer (d.h. Nichtitaliener) in der Schülerstatistik drastisch zurückgegangen. Für sie stehen im Zentrum oder zentrumsnah internationale Bildungseinrichtungen als Alternativen bereit, so dass eine

²⁵ Wenn der Abteilungsleiter der *Zentralstelle für das Auslandsschulwesen* (ZfA), Engelbart Onnen, in der Diskussion um die Durchsetzung der Begegnungsschule die Deutsche Schule Rom von 1970 mit einer Auslandsschule von 1905 verglichen hat, so wollte er damit sicher seine römischen Kontrahenten als vorgestrig darstellen, hat aber mit diesen Daten eine zusammenhängende Epoche (1904-1975) erfasst, in der wir in der Deutschen Schule Rom eine vom Schulverein getragene, interkonfessionelle, vom Deutschen Reich bzw. der Bundesrepublik unterstützte Schule vor uns haben, die stets auch Ausländern offen stand, in der internationale Begegnung aber weitgehend auf Kindergarten, Grundschule und die unteren Klassen der höheren Schule beschränkt blieb, weil ihre Abschlüsse auf Deutschland ausgerichtet waren.

²⁶ Nachdem die Schülerzahl im Jahr 2002 sogar auf 1.013 angewachsen war, ist sie in den letzten Jahren rückläufig und hat sogar die Zahl 900 unterschritten.

²⁷ R. Grätz, *Deutsche Schule Rom*, «Jahresbericht» 1991-1992, pp. 24.

gewisse Gewichtsverschiebung von internationaler Begegnung zu einer stärker bikulturellen Prägung der Schule eingetreten ist.

Im Zusammenhang mit der Einführung von Französisch neben Latein als Fremdsprache in Klasse 7 – nämlich um organisatorische Probleme bereiternde Zersplitterung in Kurse ab Klasse 7 zu vermeiden – stand die ab 1994 im Unterschied zu Mailand betriebene Auflösung des LII-Zweiges (*Realschule*). Die Leistungsstufe II war 1977 an die Stelle des bestehenden Realschulzweiges getreten. Wie dieser ein Reflex auf die Tatsache, dass die Schüler der Deutschen Schule in ihren Leistungen sehr differieren, die deutschen Schüler aber betreut werden müssen, hatte sich die Leistungsstufe II zum Ziel gesetzt, die Schüler auf eine berufliche Tätigkeit vorzubereiten, eine Grundlage zur Weiterbildung in Deutschland durch das Zeugnis der mittleren Reife zu bieten, den besseren Absolventen (Notendurchschnitt der Hauptfächer 2,5 u.a.) einen Weg (ohne Latein) zum Abitur zu eröffnen und den italienischen Schülern eine Weiterbildung an einer italienischen Schule zu ermöglichen, ohne dass das *terza media* Examen abgelegt werden musste. Die Abschaffung dieses Zweiges bedeutete, dass die Klassen 7-10 in ihren Leistungen eine wesentlich breitere Fächerung aufweisen mit allen Problemen inhomogener Gruppen. Die Schule verzichtete damit auf einen Filter für die Zulassung zum Besuch der gymnasialen Oberstufe.

Der Ausbau der Schule zur bikulturellen Vollanstalt mit um die 900 Schülern eröffnete größere Möglichkeiten, auf musikalischem und sportlichem Gebiet viel beachtete Aktivitäten zu entfalten und dem kulturpolitischen Anspruch umfassender gerecht zu werden.

Die Schauspielgruppen haben mit beachtlichem Erfolg auch große Theaterliteratur (Tschechow, Molière, Büchner, Brecht, Goethe, Shakespeare, Dürrenmatt, Canetti) auf die Bühne gebracht. Chor und Orchester, in dem auch Eltern, Lehrer, ehemalige Schüler, auch Schüler anderer römischer Schulen mitwirkten, gaben regelmäßig Konzerte in römischen Kirchen, wobei wohl die Aufführungen des *Deutschen Requiems* von Brahms und Verdis *Requiem* besondere Höhepunkte darstellten, später gelangten auch Musicals wie *Jesus Christ Superstar* zur Aufführung.

Auf sportlichem Gebiet gehörte die DSR zu den Gründungsmitgliedern des italienischen Handballbundes (FIGH). Ihre Jungen und Mädchen spielten in den 1960er und 1970er Jahren in den obersten beiden Ligen auf nationaler Ebene mit, die Mädchen gewannen sogar 1971 und 1973 die italienische Meisterschaft.

Die musischen und sportlichen Begegnungen, man könnte noch die Feste wie das Martinsfest hinzuzählen, und ihre Resultate können zweifellos als Aktivposten der Entwicklung zur Begegnungsschule gerechnet werden. Sie förderten Begegnungen von deutschen und italienischen (auch anderer Nationen) Eltern, Lehrern und Schülern, das spielerische Element hat gewiss gegenseitiges Kennenlernen erleichtert. Wie weit treffen solche Aussagen für schulischen

Alltag, die gemeinsame Auseinandersetzung mit von der Wissenschaft bestimmten Gegenständen zu? K.R. Hug gelangte in seiner auf Schülerbefragungen von 1987 beruhenden Studie zu deutlich positiven Urteilen über die Wirksamkeit der bikulturellen Erziehung einer Begegnungsschule bezüglich Zielsetzungen wie u.a. «wechselseitige kulturelle Durchdringung, Toleranz und Offenheit für andere und Aufgabe von Voreingenommenheit»²⁸.

Die von der Politik den deutschen Auslandsschulen und eben auch den deutschen Schulen in Italien zugewiesenen Aufgaben beschrieb Außenminister Hans-Dietrich Genscher bei der Einweihung des Schulneubaus und legte dabei ein Bekenntnis zur Begegnungsschule ab:

Unsere Auslandsschulen sollen zur Weltoffenheit erziehen und damit Verständigung fördern. Sie sollen Grundwerte vermitteln, wie unsere Gesellschaft sie mit anderen Staaten und Gesellschaften freiheitlich– demokratischer Grundordnung teilt; sie sollen schließlich die deutsche Sprache verbreiten und Kenntnisse über Deutschland vermitteln. Wir glauben, daß wir mit einer Begegnungsschule, wie der Deutschen Schule in Rom, d.h. einer Schule, in der Deutsche und Italiener gemeinsam lehren und lernen, diesen Zielen am nächsten kommen.

Genscher gab den deutschen Schulen in Italien darüber hinaus eine europäische Aufgabe: «es geht darum, gemeinsam das Europa der Zukunft zu bauen, ein Europa, das seine Einheit in kultureller Vielfalt verwirklicht. Gerade die deutschen Schulen in Italien können unseren Völkern ihre gemeinsame Identität immer stärker bewußt werden lassen».

An dieser positiven Grundeinschätzung hat sich bis heute, jedenfalls offiziell, kaum etwas geändert²⁹.

4.2. *Der Schulstreit von 2002*

Welche Entwicklungen haben die ersten 15 Jahre des neuen Jahrhunderts gekennzeichnet? Nach einem glänzenden Jubiläumsjahr 2001, in dem mindestens 10 Jahre zu früh eines 150jährigen Bestehens der Schule mit einer beachtlichen Zahl von gelungenen Veranstaltungen mit einer großen kulturellen Bandbreite gedacht wurde, brach recht unerwartet ein neuer Schulstreit aus, in den wie hundert Jahre zuvor das *Auswärtige Amt*, statt Schulreferat jetzt die *Zentralstelle für das Auslandsschulwesen*, sowie die Botschaft in Rom eingriffen, dabei nicht immer glücklich agierten, bis am Ende ein neuer Schulvorstand und eine neue Schulleitung die Arbeit wieder aufnehmen konnten. Auch die Presse war wieder nicht nur berichtend und kommentierend beteiligt. Monokausal wie auch mit Differenzen der agierenden Personen lassen sich die heftigen

²⁸ K.R. Hug, *Bikulturelle Erziehung. Eine empirische Studie der Effekte bei Schülern der Deutschen Schule Rom*, Münster-New York, Waxmann, 1994, p. 197ff. Die Schule selbst hat in den letzten Jahren an der Erarbeitung von Leitsätzen gearbeitet.

²⁹ Vgl. Vesper, p. 355, Anm. 272.

Auseinandersetzungen, die zeitweilig um den Bestand der Schule fürchten ließen, nicht ausreichend erklären.

Zunächst ist ein Stau von strukturellen Problemen festzustellen. Der Schulvorstand der vom Schulverein³⁰ getragenen Schule führt die Geschäfte und trifft die Entscheidung bei der Auswahl der von der *Zentralstelle für das Auslandsschulwesen* (ZfA) vorgeschlagenen Bewerber für die Stellen von Schulleiter und vermittelten Lehrern. Die Vorstandsmitglieder sind abgesehen von den beiden Vertretern der Kirchen Eltern von Schülern. Sie entscheiden auch über Vertragsverlängerungen von Schulleiter und den aus Deutschland vermittelten Lehrern, wodurch ein an staatlichen deutschen Schulen unbekanntes Abhängigkeitsverhältnis von Eltern entsteht. Die Lehrkräfte gliedern sich in von Deutschland (damals auch noch von Österreich) bezahlte Auslandsdienstlehrkräfte und vom Schulverein angeworbene Ortslehrkräfte (*assunti in loco*), die bei (meist) gleicher Qualifikation wie die Vermittelten, «gemessen an den römischen Lebenshaltungskosten mit Hungerlöhnen»³¹ bezahlt wurden. Ein weiteres Problem stell(t)en die Grenzen der jeweiligen Kompetenzen von Schulvorstand und Schulleiter dar.

Der Aufbau deutscher Auslandsschulen in Mittel- und Osteuropa, ermöglicht durch die politischen Umwälzungen nach 1989, führte zu einer Umverteilung der für Auslandsschulen zur Verfügung stehenden Mittel zuungunsten der traditionellen Standorte. Nach Rom wurden statt 25 nur noch 18 Lehrer vermittelt, was den Schulverein zwang, auf dem deutschen Lehrermarkt Lehrer anzuwerben, was bei der Attraktivität Roms auch meist gelang, aber eine Steigerung der durch das Vermittlungssystem schon hohen Fluktuationsrate im Lehrerkollegium zur Folge hatte, da die meist jungen Lehrkräfte Rom verließen, wenn ihnen in Deutschland eine feste Stelle angeboten wurde. Insgesamt ging der Anteil der von Deutschland getragenen Kosten von etwa 80% auf um die 50% zurück. Dies zwang den Schulverein zu Sparmaßnahmen³² bzw. Schulgelderhöhungen. Für die Eltern der aus Deutschland kommenden Schüler, deren Anteil seit 1975 von über 50% auf unter 20% zurückgegangen war, stellte das kein Problem dar, da die Schulkosten von deutschen Stellen getragen wurden, die italienischen Kinder kamen meist aus wohlhabenden Familien – die Deutsche Schule war aufgrund der deutschen Schulbeihilfe finanziell aber günstiger als die anderen ausländischen Privatschulen in Rom. Schwierigkeiten hatten aber vermehrt die deutsch-italienischen Familien, eine für die Begegnung,

³⁰ Da er kein eingetragener Verein nach italienischen Recht ist, stellen sich erhebliche Haftungsprobleme für seine Mitglieder.

³¹ D. Polaczek, *Selbstzerfleischung. Der Machtkampf um die Deutsche Schule in Rom*, Frankfurter, Allgemeine Zeitung, vom 10.6.2002, p. 45. Sie wurden entsprechend den Lehrkräften an italienischen Schulen bezahlt.

³² Im Gefolge der rückläufigen Zuschüsse aus Deutschland verschleppte der Schulvorstand die anstehenden Gehaltsverhandlungen mit den Ortskräften, was diese zum ersten Lehrerstreik in der Geschichte der DSR veranlasste.

aber auch den Deutschunterricht wichtige Klientel, die sich gezwungen sah, ihre Kinder auf italienischen Schulen anzumelden. Im 19. Jahrhundert hätte man gesagt, *sie gingen dem Deutschtum verloren*.

Der Schulvorstand versuchte, diesen Problemen mit einer Erhöhung der Schülerzahl, die für die Zuteilung von Zuschüssen aus Deutschland von Bedeutung war, zu begegnen. Er dachte an einen Ausbau des Kindergartens, eine vierzügige Grundschule und Dreizügigkeit bis zum Abitur. Er hatte festgestellt, dass in Rom etwa 600-700 deutsch-italienische Kinder lebten, von denen 350-400 italienische Bildungseinrichtungen besuchten. Diese potentielle, wegen ihrer Zweisprachigkeit für die Schule interessante Klientel wollte man stärker für die deutsche Schule interessieren, wobei die Frage der Schulgeldhöhe ein Problem war. Ferner wollte man verstärkt an deutscher Kultur interessierte Italiener gewinnen. Erste Erfolge zeigte die Schülerstatistik von 2002 mit erstmals über 1000 Schülern. Nach Angaben des damaligen Schulvorstandsvorsitzenden Udo Gümpel hatte man für 90 Kindergartenplätze 600 Bewerber. Für den Ausbau, insbesondere für den Unterbau der Schule (und die Errichtung einer Mensa für einen Ganztagesbetrieb) wollte man auf das Haus IV zurückgreifen, das sich heute das DHI und die ELKI teilen und in dem vor 1985 Teile der Schule untergebracht waren.

Diese Politik fand aber nicht den ungeteilten Beifall aller an der DSR interessierten Gruppen, die aus unterschiedlichen Interessen eine *Italienisierung* befürchteten. Man sah vorher, bei der Zuteilung von Kindergartenplätzen hinter den Italienern zurückstehen zu müssen, für die der Besuch des Kindergartens als notwendig für eine erfolgreiche Schulkarriere an der DSR gilt.

Die Entwicklung der Schule zu einer integrierten Gesamtschule ohne deren Möglichkeiten der Binnendifferenzierung und ohne hinreichende Zulassungskriterien für den Besuch der gymnasialen Oberstufe, Folge vor allem der Abschaffung des Realschulzweiges, die nachlassenden Deutschkenntnisse seitens der Schüler aufgrund des schwindenden Anteils der *native speaker* einerseits, des Rückgang des deutschsprachigen Unterrichtsangebots andererseits hatten insbesondere bei den Deutschen, die sich nur vorübergehend in Rom aufhielten, Befürchtungen aufkommen lassen, dass nach Deutschland zurückkehrende Schüler bei der Wiedereingliederung in die (insbesondere süddeutschen Gymnasien) Schwierigkeiten haben könnten. Vor allem in den mathematisch-naturwissenschaftlichen Fächern wurden Rückstände im Vergleich zu Deutschland beklagt. Die ständig in Rom lebenden Deutschen, vor allem die *misti* hatten ein größeres Interesse an Zweisprachigkeit, da ihre Kinder auf ein Studium und Leben in Italien vorbereitet werden sollten.

So gab es einerseits stärker deutsche Verhältnisse wünschende und andererseits einen weiteren Ausbau des Begegnungsschulgedankens, die Vorstellungen der italienischen Klientel befürwortende Gruppierungen, was grundsätzlich nicht neu war, sondern schon im Vorfeld des Anerkennungs Memorandums von 1975, aber auch in den vorhergehenden Jahrzehnten zu beobachten war.

Ein Grundproblem lag bei den immer wieder aufgeschobenen, nicht gelösten Eigentumsfragen.

1938 hatte der Schulverein für 240.000 Dollar die Liegenschaft in der *via Savoia* erworben, von denen 210.000 Dollar das Deutsche Reich trug. Der Schulverein steuerte aus dem Verkauf des alten Schulgebäudes in der *via Zucchelli* 585.000 Lire bei, um den Rest des Kaufpreises und notwendige Ausstattung und Renovierungsarbeiten zu bezahlen. Bei der Rückgabe des im Zweiten Weltkrieg sequestrierten Eigentums in der *via Savoia*, die nur an den Schulverein erfolgen konnte, brachte die Bundesrepublik insgesamt 2,5 Millionen DM auf, weitere Kosten in Millionenhöhe entstanden für den Bund bei den durch das Wachstum der Schule erforderlich gewordenen baulichen Erweiterungen, u.a. den sog. *Klaiberbau* und Pavillons. Mit 65 Millionen DM – aufgrund der Bodenverhältnisse hatten sich die ursprünglich veranschlagten Kosten fast verdoppelt – baute die Bundesrepublik auf ihrem Gelände in der *via Aurelia antica* einen repräsentativen Schulneubau, womit die räumlichen Probleme langfristig gelöst waren. Der Schulvorstand sollte für die Nutzung auf sein Eigentum in der *via Savoia* verzichten, wo jetzt das Goethe-Institut untergebracht wurde. Es war ihm aber ein Wertausgleich zugesagt worden. Am 18.3.1996 brachte der Schulverein durch seine Vorsitzenden Dr. Christian Miczaika und Charlotte Hein der Botschaft in Erinnerung, dass der in Aussicht gestellte Wertausgleich noch nicht durchgeführt worden sei. Die *damals vereinbarte Summe* habe DM 454.843,26 betragen. Der Schulverein bat um Eigentumsübertragung und die Zahlung des Wertausgleichs, ohne dass Kosten entstehen sollten. Am 22.5.1996 teilte die Botschaft dem Schulverein mit, dass laut Auskunft des Auswärtigen Amtes bislang kein Einvernehmen über die Höhe des Wertausgleichs erzielt worden sei. Das Finanzministerium wolle eine genauere Untersuchung der jeweiligen Leistungen, der Wertausgleich werde aber unter DM 454.843,26 liegen. Gemäß der Eigentumssicherungsvereinbarung vom 5.7.1974 könne die Bundesrepublik verlangen, dass das Schulgebäude in der *via Savoia* dem *Goethe-Institut* kostenlos zur Verfügung gestellt werde. Angesichts der Zuwendungen der Bundesrepublik erscheine eine Ausgleichszahlung nicht gerechtfertigt. Alle künftigen Leistungen der Bundesrepublik würden unter dem Vorbehalt einer Anrechnung auf die geltend gemachte Wertausgleichszahlung gemacht. In Anbetracht eines Neubaus von 60 Millionen DM seien weder das AA noch das BMF bereit, diesen Wertausgleich zu zahlen.

Der Hinweis auf die mögliche Einbeziehung künftiger Schulunterstützungsleistungen setzte die Schule natürlich unter Druck, war sie doch auf Schulunterstützung aus Deutschland angewiesen. Der Vorstand beschloss einstimmig am 17.9.1996 die Eigentumsübertragung der Liegenschaft in der *via Savoia* ohne Wertausgleich an die Bundesrepublik durchführen zu lassen. Aus formalen Gründen musste aber die Abstimmung wiederholt werden (Mitteilung Miczaikas zu Top 3 Vorstandssitzung vom 17.12.1996 mit der delibera: «Der Vorstand beschließt einstimmig die Eigentumsübertragung des ehemaligen

Schulgrundstücks in der *via Savoia* in Rom ohne Wertausgleich an die Bundesrepublik)». Dies war auch noch der Stand am 10.6.1997. Auf der Mitgliederversammlung des Schulvereins vom 17.2.1998 äußerte sich der frühere Vorstandsvorsitzende, der Journalist Dr. Wolfgang Saile, zur Frage des Wertausgleichs. Die Schule habe ein Recht auf Einspruch, wenn das AA den Wertausgleich nicht gewähre. Er könne nicht verstehen, wie es im letzten Jahrzehnt zu dem Ungleichgewicht zwischen dem Eigentumsrecht des Schulvereins und dem Benutzungsrecht an der neuen Schule gekommen ist. Saile hielt den Umgang der deutschen Behörden mit dem Schulverein für ungerecht. Die Liegenschaft in der *via Savoia* sei Eigentum des Schulvereins, den man nicht einfach enteignen könne. (*Beifall im Saal!*) Damit hatte er einen wichtigen Gesichtspunkt angeschnitten: Nur an den Schulverein als kulturellen Zwecken dienenden Verein konnte sowohl 1925 als auch 1958 die Herausgabe des sequestrierten Eigentums erfolgen. Dass man einen Immobilienbesitz in der Lage der *via Savoia* gegen ein zeitlich beschränktes Nutzungsrecht am Neubau in der *via Aurelia antica* eintauschen sollte, ist auch mit dem Hinweis auf die in der Tat enormen Aufwendungen der Bundesrepublik für den Neubau schwer zu verstehen³³.

Hintergrund der folgenschweren weiteren Verschleppung der Eigentumsfrage dürften die Anfang 1998 aufgetretenen Spannungen zwischen dem Schulvorstand und dem Schulleiter Dr. Günter Reiter gewesen sein. Der Schulvorstand warf dem Schulleiter u. a. Kompetenzüberschreitungen und Eigenmächtigkeiten bezüglich Einstellungen von Lehrkräften und Personalführung vor. Auch hatte die Verletzung des Abiturgeheimnisses die Kritik der Prüfungsbeauftragten Dr. Tischer hervorgerufen, was den Vorstand um den Ruf der Schule fürchten lie. Nicht zulässig hielt der Schulvorstand Reiters Eingreifen in die Wahlkampagne für die bevorstehenden Wahlen von neuen Schulvorstandsmitgliedern und unter Berufung auf ein Anwaltsgespräch die nach italienischem Recht, dem auch der Schulleiter unterstehe, nicht erlaubte Herausgabe von Informationen aus dem Schularchiv. Letzteres betraf den Vorsitzenden, der laut Abiturzeugnis der Deutschen Schule Rom amerikanischer Staatsbürger war.

Dies aber war folgenreich, denn laut Satzung musste der Vorsitzende des Schulvereins deutscher Staatsbürger sein. Miczaika trat zurück, seine Mitwirkung an der Eigentumsübertragung hatte keine Gültigkeit, die Liegenschaft in der *via Savoia* blieb weiterhin Eigentum des Schulvereins. Zu erwähnen ist in diesem Zusammenhang, dass um 2000 die deutschen Stellen erwogen, dem Schulverein zu einem symbolischen Preis die Schule in der *via Aurelia* zu verkaufen. Es sollte eine entsprechende Studie von deutscher Seite zu diesem Zweck vorbereitet werden. Laut Bericht des Vorsitzenden des Schulvereins

³³ M.E. hätte der Schulverein anteilig als Miteigentümer der Liegenschaft in der *via Aurelia antica* unter Einberechnung aller Leistungen der Bundesrepublik für die alte Schule seit 1958 eingetragen werden können. Zumindest hätte man ein unbefristetes Nutzungsrecht als deutsche Schule gemäß den deutschen Richtlinien für Auslandsschulen als Ausgleich für den Eigentumsverzicht verlangen (und zugestehen) sollen.

auf der Jahresmitgliederversammlung am 28.2.2001 war dieses Thema aber nicht mehr aktuell³⁴.

Ausgelöst wurde der Konflikt durch die wirtschaftlichen Aktivitäten im Schulumfeld, *wo es um viel Geld* ging³⁵. Der Umzug an den Stadtrand hatte, wie schon 1954-57, als die Schule auf den Monte Verde umgezogen war, zum Schülertransport mit 16 Schulbussen geführt. Im *doposcuola*-Programm unterstützte die Schule Aktivitäten in Sport und Musik, ferner gab es eine *Cafeteria* in der Schule. Von der Verwaltungsleitung (Dott. Mario Panella) war angeregt worden, diese Aktivitäten aus der Verantwortung des Schulvorstandes herauszunehmen und auf eine 1996 unter Federführung der Botschaft gegründete Associazione B als Onlus-Verein zu verlagern, um diese Geschäfte fiskalisch einwandfrei zu führen. «Der Schulverein A warf 2001 dem Schulverein B Unregelmäßigkeiten und fehlende Rechnungsprüfung vor. Eine von der Botschaft veranlaßte Rechnungsprüfung ergab angeblich keine Beanstandung»³⁶. Das an der Schule gehandhabte kameralistische Buchführungssystem wurde auch von dem in vielen Punkten vom Vorstand A in Frage gestellten Dienstreisebericht «zur Haushaltsführung der Deutschen Schule Rom vom 02. Dezember bis 06. Dezember 2002» als problematisch herausgestellt, da Stand und Entwicklung des Anlagevermögens (Wertverluste, Abschreibungen) nicht erfasst wurden. Dringend wurde die Einführung einer kaufmännischen Buchführung empfohlen. Strittig war vor allem das Eigentum an den Schulbussen, deren Rückgabe an A vom gekündigten Vorstand B abgelehnt wurde.

Natürlich fehlte nicht die Komponente Persönlichkeiten. Im Herbst 2000 wurde mit Peter Kleefass ein Schulleiter aus Baden-Württemberg gewählt, von dem die deutschen Stellen wohl auch eine Lösung der römischen Probleme erhofften. Auch im Schulvorstand war ein Wechsel an der Spitze eingetreten. Nachdem Helmut Brück im Oktober 2001 aufgrund von Spannungen im Schulvorstand sein Amt niedergelegt hatte, in der Geschäftsführung bis zur Jahreshauptversammlung im Februar 2002 von der stellvertretenden Vorsitzenden, der Wiener Journalistin (*Kurier*) Dr. Luise Hahn, ersetzt worden war, wurde der Journalist Udo Gumpel, im Vorstand schon als Mitglied von Personal- und Finanzausschuss im Einsatz, zum Vorsitzenden gewählt. Kleefass und Gumpel waren nicht unbedingt konfliktscheue Personen und hatten verschiedene Vorstellungen von Schule.

³⁴ Anlage 1, S. 2, zum Protokoll der Mitgliederversammlung vom 28.2.2001.

³⁵ Wie Anm. 32. Der Verein A hatte den Servicevertrag mit Verein B gekündigt und forderte von B fünf Schulbusse zurück.

³⁶ Wie Anm. 32. Am 13.5.2002 warf der Vorstand des Deutschen Schulvereins, der Botschaft vor, seine Kontrollfunktion gegenüber der B nicht ordnungsgemäß wahrgenommen zu haben. Im Rechnungsprüfungsbericht 2000/01 vom 14.2.2002 hatten Dr. Kurt Becker und Prof. Fabio Giulio Grandis wie schon im Bericht für 1998/99 eine nicht ordnungsgemäße Vermögensbuchhaltung moniert.

Im Zusammenhang mit der Gestaltung des Martinsfestes, traditionell wichtigstes Schulfest (ursprünglich des Kindergartens), von Eltern, Schülern und Lehrern vorbereitet, dessen Einnahmen von regelmäßig über 20.000 DM ein durchaus wichtiger Posten zur Finanzierung außerordentlicher Anschaffungen für die Schule darstellen, war es zu Meinungsverschiedenheiten von Schulleiter und Eltern gekommen. Der Schulleiter war mit dem Ausmaß der sich auf den Unterricht ausdehnenden Vorbereitungen nicht einverstanden, wobei seiner Ansicht durchaus auch eine Reihe von Lehrern folgten, und kündigte einen Kampf gegen diese Zustände an. Er war aber auch mit der unterrichtlichen Situation nicht zufrieden und sah insbesondere in den ihm naheliegenden Fächern des mathematisch-naturwissenschaftlichen Aufgabenfeldes die deutschen Standards gefährdet. Im Umgang mit seinen Kollegen in der Schulleitung traten bald Spannungen auf. Kleefass setzte im Januar 2001 die Rücknahme der von der Heimatbehörde schon genehmigten und vom Schulvorstand ausgesprochenen Verlängerung des Dienstverhältnisses mit dem stellvertretenden Schulleiter durch. Die Mittelstufenkoordinatorin musste 2002 gehen, der Grundschulleiter verlie ebenfalls 2002 die Schule, weil er die Spannungen in der Schulleitung nicht mehr aushalten wollte, der Vertrag des Oberstufenkoordinators lief aus. So war von fünf Schulvorstandsmitgliedern³⁷ am Ende des Schuljahres 2001/2002 nur der Schulleiter übrig geblieben³⁸. «Der Schulvorstandsvorsitzende Udo Gümpel hat – manche sagen im Alleingang – Kleefass fristlos entlassen. Die Rechtsgültigkeit der Kündigung ist strittig. Kleefass amtiert(e) weiter³⁹. Nach einer tumultuarischen Mitgliederversammlung am 27.2.2002 enthob der deutsche Botschafter Klaus Neubert in den Osterferien den Vorstand des Schulvereins seines Amtes und setzte sich selbst als kommissarischen Schulleiter ein»⁴⁰. Am 2.5.2002 berief er für den 5.6.2002 eine außerordentliche Mitgliederversammlung ein, auf der Vorstandsmitglieder gewählt werden sollten. Das Auswärtige Amt (Werner Lauk) drohte am 15. Mai in einem Brief an den Elternbeirat der Schule, der auch im Lehrerzimmer ausgehängt wurde, mit der Sperrung der Schulbeihilfe und der weiteren Vermittlung von Auslandsdienstlehrkräften. Er sah aufgrund einer «mangelnden Verständigungsbereitschaft von Mitgliedern des Vorstands keine Vertrauensgrundlage für eine gedeihliche Fortsetzung der Zusammenarbeit». Von der Neuwahl eines Schulvorstandes auf der vom Botschafter einberufenen außerordentlichen Mitgliederversammlung erhoffte sich dass AA einen Neuanfang⁴¹. Der Schulvorstand erwiderte die Drohung mit dem Entzug der

³⁷ 150 Jahre Deutsche Schule Rom. Jahresbericht 2000/2001, p. 159.

³⁸ Sehr polemisch, bezüglich der Personalien aber zutreffend: Chr. Kohl, *Im Zeichen des Kreidekrieges*, Süddeutsche Zeitung vom 4.6.2002, s. 3. Ihr Artikel (auf der Seite 3) dürfte bei den deutschen Stellen ein gewisses Umdenken bezüglich der römischen Frage ausgelöst und die Stellung des Schulleiters angeschlagen haben. Frau Kohl war Mutter einer Abiturientin des Jahres 2001.

³⁹ Wie Anm. 32.

⁴⁰ Wie Anm. 40.

⁴¹ Der Brief stellte auch heraus, dass die Bundesrepublik der Schule die Liegenschaft in der

Schulbeihilfe, mit Hinweisen auf einen möglichen Rückgriff auf das Grundstück in der *via Savoia*, was das Goethe-Institut in Bedrängnis gebracht hätte.

Der Vorstand schaltete vor allem die Gerichte in Rom und Berlin ein und erwirkte beim Landgericht in Berlin am 31.5.2002 eine einstweilige Verfügung gegen den Botschafter, in welcher diesem verboten wurde, die Geschäfte des Vorstandes des Schulvereins zu führen, eine Mitgliederversammlung oder eine Wahl von Vorstandsmitgliedern abzuhalten oder abhalten zu lassen. (Für jeden Einzelfall der Zuwiderhandlung wurden dem Botschafter ein Ordnungsgeld von bis zu Euro 250.000, ersatzweise Ordnungshaft bis zu 6 Monaten oder Ordnungshaft von 6 Monaten angedroht).

Schulleiter Kleefass, zumindest bis zu diesem Zeitpunkt von den deutschen Stellen gestützt, geriet Anfang Juni in die Kritik der *Süddeutschen Zeitung* und der *Frankfurter Allgemeinen Zeitung* bezüglich seiner Personalpolitik und seines Kommunikationsstils⁴². Er propagierte eine Schule, die deutlicher den Interessen der deutschen Klientel entsprach, und wollte eine Trennung von der Schule des Schulvorstandes in Kauf nehmen.

Nachdem schon im Gefolge des Briefs des AA Dr. Kurt Becker, Dr. Dieter Mertens, Dr. Wolfgang Saile, Oriol Schädel und Horst Schlitter als ehemalige Präsidenten Vizepräsidenten und Schatzmeister/Rechnungsprüfer in einem Schreiben am 22.5.2002 an die Vereinsmitglieder zum Konfliktabbau aufgerufen hatten, hatte sich in der folgenden Zeit ein Verein *pro scuola* gebildet, der das bisherige Schulkonzept verteidigen und eine für den Fall der Fortsetzung des Kurses des Schulvorstandes gegenüber den deutschen Stellen für möglich gehaltene Schulspaltung vermeiden wollte⁴³. Es gelang ihm, hinreichend Anhänger zu finden, die Unterstützung der deutschen Stellen zu gewinnen und auf einer außerordentlichen Mitgliederversammlung des Schulvereins eine Mehrheit zu finden, die den bisherigen Schulvorstand abwählte. Obwohl der alte Vorstand das Hausverbot für den Schulleiter aufgehoben hatte, sollte auch dieser nicht mehr auf seinen Posten zurückkehren. In der Eigentumsfrage musste der neue Schulvorstand seine Besitzrechte auf die Liegenschaft in der

via Aurelia antica kostenlos zur Verfügung stellte, erwähnte aber nicht, dass der Schulverein dafür die Liegenschaft in der *via Savoia* für die Nutzung durch das Goethe-Institut freigegeben hatte. Besorgt über den Inhalt des Briefes traten am 22.5.2002 der ehemalige Schatzmeister und Rechnungsprüfer Dr. Kurt Becker, die ehemaligen Präsidenten Dr. Dieter Mertens, Dr. Saile und Oriol Schädel sowie Vizepräsident Horst Schlitter für einen Abbau des Konflikts und den vom AA geforderten Neuanfang auf der geplanten Versammlung am 5.6.2002 ein.

⁴² Vgl. Anm. 32 u. 40.

⁴³ Angeblich gab es im Schulvorstand Mitglieder, die eine stärkere Unabhängigkeit von den deutschen Institutionen anstrebten, den Verein in einen dem italienischen Recht angepassten Verein umwandeln und eine internationale Schule errichten wollten. Ob dies Propaganda der Kräfte war, die auf einen Ausgleich mit Botschaft/AA drängten, oder auf gelegentliche Meinungsäußerungen von Schulvorstandsmitgliedern sich stützen konnte oder ob tatsächlich konkrete Pläne in dieser Richtung bestanden, kann ich aufgrund des Mangels an konkreten Dokumenten noch nicht beurteilen.

via Savoia aufgeben und erhielt lediglich das weitere Nutzungsrecht in der *via Aurelia antica* bis 2019 sowie die Fortsetzung der Schulunterstützung durch das AA/ZfA.

Nach Beendigung dieses zweiten Schulstreits entwickelte sich die Schule mit neuer Schulleitung und neuem Schulvorstand wieder in den gewohnten Bahnen. Besonderer Wert wurde auf Schulentwicklung, Methodenarbeit und Konkretisierung von Begegnungsschule gelegt. Wichtige Änderungen in Deutschland wurden übernommen, insbesondere die Verkürzung der Gymnasialzeit auf acht Schuljahre (erstes G8-Abitur 2017), die Abschaffung des Kurssystems und die Rückkehr zum Klassenverband in der Oberstufe. Für letztere Maßnahme war wohl auch der Effekt des Lehrkräftesparens entscheidend. Seit 2014 werden in Rom im schriftlichen Abitur in den Fächern Mathematik, Physik, Chemie, Biologie, Geschichte, Englisch, Deutsch die gleichen Aufgaben wie an den Deutschen Schulen in Mailand, Genua und Griechenland gestellt.

Die hohe Schülerzahl des Jahres des Jahres 2002⁴⁴ wurde freilich nie mehr erreicht. Inzwischen besuchen nicht einmal 900 Schüler die Deutsche Schule Rom. Die Mittelsenkungen führen zu Qualitätsverlusten. Wenn z.B. keine vermittelten Musiklehrer angefordert werden können, führt das zu einem Wegfall von gerade für die Begegnung wichtiger Aktivitäten und Aufführungen. Zudem erschwert die sinkende Zahl älterer Schüler eine erfolgreiche Chor- und Orchesterarbeit⁴⁵.

Das neue Auslandsschulgesetz bringt für die Schule zwar größere Planungssicherheit, wird aber zu geringeren finanziellen Leistungen seitens Deutschlands führen, da deren Zuweisung ausschließlich von der Höhe der Abiturientenzahl abhängig gemacht wird. Mit der Unterstützung des Bologna-Modells (Einrichtung eines deutschen Zweiges an einem römischen *liceo*) entzieht man aber den höheren Klassen einen Teil ihrer seit 1975 mit dem Anerkennungs memorandum gewonnen Klientel. Ein weiterer Rückgang der Schülerzahlen ist zu befürchten.

⁴⁴ Nach Mitteilung des damaligen Vorsitzenden Gümpel hätte man sogar ca. 50 Anmeldungen für den Kindergarten zurückweisen müssen.

⁴⁵ Vgl. H.-J. Peleikis, *Die Schulmusik als wichtige Kraft im Dialog der Kulturen: Interview mit Helmut Burkhard*, «Deutsche Lehrer im Ausland», n. 2, 2016, pp. 111-118.

Tradition and innovation in foreign language teaching in Gran Canaria in the Nineteenth Century

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ABSTRACT: This paper focuses on foreign language teaching in Gran Canaria in the 19th century. Its purpose is to determine the foreign languages taught on the island at that time, the approaches and methods used to teach those languages and the reasons and needs of the students to learn a specific language. Section Two describes the influential presence of foreigners in the Canary Islands and their significant role in the development of the Canarian economy, culture and even the variety of Spanish language spoken in the islands. Section Three presents a brief review on the state of education in the islands in the 19th century. Section Four details the foreign languages taught in Gran Canaria in the 19th century while in the following five sections the methods used for the teaching of those foreign languages are explained briefly. Finally, the conclusions drawn from this study are offered.

EET/TEE KEYWORDS: Language teaching; Tradition; Innovation; History of Education; Canary Islands; XIXth Century.

Introduction

For centuries, people have been interested not only in learning foreign languages but also in improving the way to do so. In this century 21st century, when we think about the history of foreign language teaching amid the use of new technologies and its many possibilities, we study a particular case, that of the island of Gran Canaria in the nineteenth century, to reflect on how innovation and tradition have always been closely connected in language teaching. As many others, Leinenbauch and Gillette¹ believe that there is a cyclical rather

¹ J. Leinenbauch, B. Gillette, *Language: Artifact or activity? An epistemic history of foreign*

than linear evolution of the approaches to language teaching and that this cycle deals with two trends in the design of foreign language methods, natural or inductive methods which have traditionally place more emphasis on oral skills and deductive methods which aims at the knowledge of grammar rules.

On the other hand, according to Viña Rouco² there is a scarcity of studies on the history of foreign language learning in the different European countries until recent times due to the complexity of its contents. In Spain there are some valuable researches about the teaching of specific method, a particular foreign language in certain years or the history of the teaching of Spanish or English as a foreign language in mainland Spain. Our research is framed geographically in the island of Gran Canaria and the chronological context extends from mid-19th century to the beginning of the 20th century. The goals we set were:

- to research on the foreign languages taught in the island throughout the 19th century;
- to examine the different methods used to teach those languages and assess the advantages and drawbacks.

While there is little published on the subject of education in the Canary Islands during the nineteenth century, and despite the significant foreign presence in the economic, social and cultural life of the islands and the interest of the Canarian inhabitants to speak a foreign language, there has been no proper research on foreign language teaching in the islands. The fact that there were so few schools in Gran Canaria favoured the possibility of a specific study on this type of education on the island.

To study the teaching of modern languages in the nineteenth century both in public and private institutions such as the Seminary in Las Palmas, the San Agustín School, the Local High School and the so-called ladies' schools, and also in private classes, I checked the few books and articles written on education in the islands in the nineteenth century and visited the Las Palmas Bishopric Diocesan archive, the newspaper and periodicals library at the Canary Museum, the Columbus House Library, the Provincial Historic Archive, the Universidad de Las Palmas de Gran Canaria Library and some private libraries, in search of the lesson plans and textbooks used in these schools.

I also consulted the fifty-four newspapers published in the press in Las Palmas from 1854 to the beginning of the twentieth century. From these newspapers I examined most articles related to education such as the opening ceremonies at private and public schools, the public exam announcements, but mainly the advertisements for private lessons found in those newspapers. As mentioned before, many visitors on their way to other countries offered their services in the local press. They usually published an advertisement with some information

language teaching methodology, «The European Legacy», vol. 2, n. 3, 1997, p. 484.

² M. Viña Rouco, *Metodología inductiva y deductiva en la enseñanza de lenguas vivas en España en el siglo XIX*, «Porta Linguarum», vol. 4, 2005, p. 185.

about the languages they taught, the cost of the lessons, the place where they would meet with the students and, sometimes, their teaching method.

This paper is structured as follows. Section Two describes the influential presence of foreigners in the Canary Islands and their significant role in the development of the Canarian economy, culture and even the Spanish language spoken in the islands. Section Three presents a brief review on the state of education in the islands in the 19th century. Section Four details the foreign languages taught in Gran Canaria in the 19th century while in the following five sections the methods used for the teaching of those foreign languages are explained briefly. Finally, the conclusions drawn from this study are offered.

The presence of foreigners in the Canary Islands

Located off the northwest coast of mainland Africa, the Canary Islands are one of the Spanish Autonomous Communities and an Outermost Region of the European Union. With regard to its economic resources, the Canarian economy is based primarily on tourism with about 13.2 million tourists visiting the islands per year, followed by the construction sector and tropical agriculture, primarily bananas, tomatoes, flowers and tobacco³. Ever since tourism became the primary source of income, and because of the number of foreigners living in the Canaries, islanders have been interested in learning foreign languages.

Foreigners have always been present in the Canary Islands: pirates, explorers, sailors, refugees and slaves, first; cane-growers, traders, Victorian travellers and tourists, later. Their customs, idiosyncrasies, eating habits, architectural notions and speech have influenced the islands, in general, and Gran Canaria, in particular. There is little doubt that the twenty-first-century Canarian with his/her singularities has assumed many foreign features and, among our foreign visitors, those of Anglo-American origin have played an important role in the building of Canarian identity.

As González Cruz establishes, the islands are a cultural meeting point and, despite their dependence on peninsular Spain, close commercial links with the English-speaking world were always strong. Foreigners, especially the British colony that resided here between the end of the nineteenth century and the beginning of the twentieth, played a significant role in the development of the Canarian economy, but they also had a great impact at other levels, such as the sociocultural and even the linguistic one, as the variety of Atlantic Spanish spoken in the Canaries reflects the incidence of especially the English and

³ Gobierno de Canarias. Instituto Canario de Estadística, <<http://www.gobiernodecanarias.org/istac/content/noticias/estadistica-movimientos-turisticos-fronteras-canarias-frontur.html>> (last access: 22.06.2016).

Portuguese languages on its vocabulary and expressions. In González Cruz's words,

the construction of La Luz Port by a British Company, Swanston & Co., with British engineers and materials though funded by the Spanish government, was the beginning of a dramatic change in both the shape and the life of the city. The foreign investors provided Canarians with new jobs under British management. The progress in both communication systems (wire and telephone) and means of transport, along with the improvements of the underlying structure for lighting, water supply and sanitary drainage were soon observable in the city⁴.

The British founded their own social and sports clubs, their own newspaper, «The Canary Islands Review», published weekly from March 9th 1903 until January 25th 1904 and several institutions such as the British Church of the Holy Trinity, the British Cemetery, Queen Victoria Hospital, and the Seaman's Institute, most of them still working nowadays. For González Cruz, «their entrepreneurial spirit certainly had important effects on the economy of the islands, such as the increase in commerce and the beginning of two essential industries, the export of agricultural produce (bananas, tomatoes and potatoes) and tourism, which are still our main economic resources»⁵.

In the nineteenth century, the figure of the individual traveller gave way to that of the tourist, a traveller who makes «a package tour in search of recreation, fun and health»⁶. Many foreign travellers and tourists began to visit the islands, while the number of foreign residents also increased considerably. These visitors came to the islands either for scientific purposes, e.g. to study the islands' volcanoes, flora and fauna; for health matters to benefit from the islands' weather; or on their way to America or Africa. Some of those visitors on their way to other countries offered their services as foreign language teachers, dentists, silversmiths, ecc. to earn some money while waiting for the next ship; eventually some of these visitors would decide to remain in the islands.

The state of education in the Canary Islands in the 19th century

Far away from mainland Spain, for centuries the state of education in the Canary Islands was appalling, especially in the least populated islands. The town halls' lack of money for education as well as the difficult and isolated geography of the islands contributed to the small number of schools. There is little research on the subject, mainly due to the lack of primary sources. I found

⁴ M.I. González Cruz, *English in the Canaries: past and present*, «English Today», vol. 28, 2012.

⁵ *Ibid.*, p. 21.

⁶ V. Morales Lezcano, *Los ingleses en Canarias (libro de viajes e historias de vida)*, Las Palmas de Gran Canaria, Edirca, 1986, p. 124.

some research work on the first religious orders that settled in the islands after the Castilian conquest and their obligation to teach the poor of the town where they settled or some disconnected studies on a chair of Latinity in Tenerife or some private school paid by the bishop. During the eighteenth and nineteenth centuries, the Spanish central government attempted to assess the state of primary education around the Spanish territory with the help of various surveys and questionnaires. One of these questionnaires was the one sent in 1804 to the priests of the island of Gran Canaria, which gives us an insight of the situation of primary education in the island in the early nineteenth.

In 1804, the «Real Sociedad Económica de Amigos del País de Gran Canaria» (Royal Economic Society of Friends of the Country in Gran Canaria), a private Enlightenment institution, sent a questionnaire to the sixteen parishes in the island. All but one answered the ten-item questionnaire. From the priests' answers to the 1804 letter, I conclude that most priests understood the importance of education and did their best to help the boys and sometimes girls in their villages to learn to read and do some Mathematics. However, it was difficult for them to provide these schools with funds, and some of the Fathers suggested selling common lands to raise the money for a teacher and teaching supplies. In some of these villages, certain ladies described euphemistically as 'children's friends' would usually teach little girls mainly to sew and do housework, although some also taught them to read. In general, most village schools were set up by the Church and run by poorly educated priests. Some private schools were founded with the money left by an individual in his will and some schools were founded by the different religious orders, as it was compulsory to establish a school wherever they set up a new convent. Throughout the 19th century public and private schools appeared and disappeared in the villages, but their existence relied on the income of the municipalities or on private donations.

While during the first half of the nineteenth century primary education was not widespread, in the second half of the century a number of factors led to an improvement, namely, the creation of the teachers' training colleges of La Laguna and Las Palmas, the remarkable influence of competent teachers in major population centres, the contribution of specialized primary education press to the world of Canarian teaching and the timely appearance of Juan de la Puerta Canseco⁷. In the second half of the nineteenth century, Juan de la Puerta Canseco, an elementary school teacher, founder and editor of two newspapers for teachers «El instructor» and «El Auxiliar», wrote a series of articles on primary education in the Canary Islands that were published in «La Revista de Canarias» between 1879 and 1882. In one of these articles Puerta Canseco mentions a report written in 1847 by a member of the High Primary

⁷ J. Negrín Fajardo, *La prensa especializada de enseñanza primaria en Canarias durante la segunda mitad del siglo XIX*, «Historia de la educación. Revista interuniversitaria», vol. 2, 1983, p. 307.

Instruction Commission explaining that from the 95 villages there were in the Canary Islands at the time in only 10 of them there was a free school for the education of poor children, and that with a population of 214,398 inhabitants, only 2889 boys and girls were taught for free. In the island of Gran Canaria, with 68,200 inhabitants, 1619 children received free education⁸.

Only affluent people could send their sons and daughters to school. In the capital of the island, Las Palmas de Gran Canaria, there was a private primary and secondary school, San Agustín, where students could study English and French. For some years, there was also a Local High School, but it disappeared less than eight years later in 1876. Again, English and French were taught in that High School⁹. For many years the Seminary would function as the Local High School but only boys could study there. Although not all of them became priests, they would study Latin and Greek as part of their theological speciality; but also Hebrew, Arabic, French, German and English were taught for some years as can be seen in the syllabi kept in the Las Palmas Bishopric Diocesan Archive¹⁰. At some ladies' schools they taught French and English because it was thought that it was a sign of refinement for ladies. In many of these ladies' schools, the modern language teacher was a native speaker, a fact that was explicitly disclosed in the local newspapers as part of the school's appeal. Finally, many teachers offered private lessons in French, German, Italian, Portuguese and Arabic in the local press to the minor percentage of the population able to afford education.

We have to distinguish between teachers who offered private tuition through the local newspapers and those who worked in schools, either public or private. The former were mainly foreigners or Spaniards who had lived abroad. Most private tutors would teach two, three or even four different languages. The Spanish legislation favoured foreigners as teachers of their native language. For example, the Moyano law (1857) in its article 167 established that foreign language teachers and music teachers did not need to be Spanish in order to be able to sit for public examinations so as to become a member of the public school staff¹¹. They came to Gran Canaria, sometimes on their way to America or West Africa, and they planned to stay on the island for some months, although some of them changed their minds and remained in the Canaries for many years. While on the island, they would offer their services through some advertisements in the local newspapers. If there was anyone interested in such tuition, would-be students were asked to contact the teacher either at

⁸ J. de la Puerta Canseco, *La primera enseñanza en Canarias*, «Revista de Canarias», vol. 15, 1879, p. 231.

⁹ Provincial Historic Archive, LP IP File 1-3.

¹⁰ Las Palmas Bishopric Diocesan Archive. File 18. Seminary. Pontifical University of the Canary Islands. 18.2.4. Secretary. Syllabi.

¹¹ M. Viña Rouco, *The Teaching of Foreign Languages in Europe: A Historical Perspective on Foreign Language Teaching in Spain*, «Cauce», vol. 25, 2002, p. 259.

the newspaper or at the hotel where he or she was staying. It was not unusual for some visitors who came to the islands to offer their professional services. Dentists and silversmiths, among other professions, would tell their clients to go to a particular bed and breakfast establishment to meet them.

Some of these teachers, when they offered private tuition through the newspapers, described themselves not only as modern language teachers but also as qualified accountants and experts on bookkeeping. According to Sofia Martín-Gamero, during the eighteenth century King Carlos III and the Royal Economic Societies of Friends of the Country decided that, to improve the professional level of the Spanish people, English should be included as an aid in the schools controlled by the boards of trade¹². Indeed, regarding this particular, *El proyecto de una escuela patriótica presentado a la Junta General de la Real Sociedad Bascongada de los Amigos del País*, that is, in the Royal Society of Friends of the Country's Project to Create a Patriotic School, we read: «there should be a business teacher who should also teach English [...]. There should not be an English teacher, as this would result in too many expenses». This would also explain why in San Agustín School and at the Local High School, English and French were included as subjects of the Business Studies curriculum¹³.

If private tutors were mainly foreigners, the case of the modern language teachers who worked in the elementary and secondary schools was completely different. These teachers were mainly Spaniards, although a few of them were foreigners or belonged to well-known British, Irish or French families established in the islands, as was the case of Edmundo Wood Socorro, Juan Bonny and Mitchinson. Marrero Henning regarded Carlos Ball as the first English teacher in Las Palmas de Gran Canaria¹⁴. His private school was set up in Vegueta, the old quarter of the capital, as early as 1847. González Cruz mentions Georgina Manly, as there is evidence that she was running a little school in 1855¹⁵.

This is consistent with what was happening in mainland Spain and other European countries such as England. Modern languages teachers were individuals without specific qualifications¹⁶. In this regard, in 1845 Blackie¹⁷ reported the lack of professionalism of the typical language teacher:

¹² S. Martín Gamero, *La Enseñanza del Inglés en España (desde la Edad Media hasta el siglo XIX)*, Madrid, Editorial Gredos, 1961, pp. 146-147.

¹³ *Ibid.*, pp. 146-147.

¹⁴ M. del Pino Marrero Henning, *El Colegio de San Agustín en la Enseñanza Secundaria de Gran Canaria (1844-1917)*, Las Palmas de Gran Canaria, Unelco, 1997, p. 46.

¹⁵ M.I. González Cruz, *La convivencia anglocanaria. Estudio sociocultural y lingüístico, 1880-1914*, Las Palmas de Gran Canaria, Ediciones del Cabildo Insular de Gran Canaria, 1995, p. 524.

¹⁶ Viña Rouco, *Metodología inductiva y deductiva en la enseñanza de lenguas vivas en España en el siglo XIX*, cit., p. 190.

¹⁷ *Ibid.*

We shall find everywhere that modern languages and literatures are either not taught at all, or taught in the most perfunctory style imaginable, and that not by thoroughly-disciplined philologists (to use the word in its large and proper sense), but often by any chance person picked up in the street, who happened to have the foreign trick on his tongue, whether by birth or by inoculation, it matters not.

The modern languages taught in Gran Canaria in the Nineteenth century

While the degree of literacy in Gran Canaria was poor and there were not many public schools or teachers to meet the needs of the children of the island, the need to speak a foreign language in many social circles was essential. As I have said, foreigners have always been present in the Canary Islands and speaking a language, in addition to Spanish, was important for international trade, social and cultural relationships. In general, it could be said that six modern languages were taught in Gran Canaria during the 19th century, namely, English, French, German, Italian, Portuguese and Arabic. Social prestige, together with students' reasons and needs to learn a particular language would have an influence on their choice and the type of teacher, exercises and methods used in class. Students understood that learning a language in order to be able to write a business letter is not the same as learning it to understand an aria in an opera or to speak to a client.

English and French were the most popular languages, not only at schools such as the Local High School and the San Agustín School, but also in private tuition. Santiago de Luxán¹⁸ claims that the teaching of English coincides with the awakening of British tourism in the island and the prospect of the future cultivation of sugar cane. Widely speaking, French, English and German were studied mainly for commercial reasons. French was usually preferred as it marked a sign of distinction and high education; the fact that it was very popular at the ladies' schools is noteworthy. The reason for this preference lies in the appreciation of French as a refined language, especially convenient for ladies; in fact, French was considered an 'ornamental subject' and was an essential part in the education of a lady along with embroidery, the making of hats or painting. If French inevitably appeared in the advertisements of the girls' schools, German was present mainly when they advertised the business schools of the city and, although the announcements for German shipping companies began to be seen in the local papers by late 19th century, they were never as frequent as the ones from the English companies.

According to Santiago de Luxán, due to the long standing love for opera and classical music in Gran Canaria, Italian was the favourite language among

¹⁸ S. de Luxán Meléndez, *Un aspecto del sector servicios: la oferta de clases particulares en Las Palmas 1860-1885*, «El Guiniguada», vol. 1, 1990, p. 128.

music-lovers and many Canarians would study the language to be able to understand their favourite operas and learn to read music, while Arabic was taught mainly due to the trading relationships between the Canary Islands and the north of Africa¹⁹.

Concerning the approaches and methods used in teaching foreign languages in Gran Canaria in the nineteenth century, there are not many references to methods in the nineteenth century local press, just a few to Gouin's Method of Series for English, the Ollendorff to teach English and French, and Father Lerchundi's method for Arabic. Moreover, thanks to the lesson plans kept in the Canarian Museum, we also know that French teachers at the San Agustín School used the Chantreau Method, adapted to Spanish students by Bergnes de las Casas, and that at the Business School (which later became the Local High School), the Ollendorff Method was used to teach English and French from 1864 to 1868²⁰.

All these methods except the Gouin's Method of Series follow a deductive approach to foreign language teaching. According to Viña Rouco²¹ in Spain in the 19th century and the first third of the 20th century deductive approaches were preferred. On the contrary, the authors who clearly favoured the adoption of active and monolingual inductive methods such as Marcel Claude, François Gouin, Paul Passy, Heness, Sauverur, ecc. had little fortune in Spain. Most of these European authors emigrated to America, where there was a more favorable disposition to this type of approach that tries to develop the communication skills of the student through the oral presentation of language, avoiding the explicit explanation of the grammatical rules. The root cause of the limited success of the methodology of inductive approach regarding foreign languages in the Spain was, according to this author, the combination of several factors including modern language teachers' lack of training.

A deductive approach involves the learners being given a general rule, which is then applied to specific language examples and practiced through exercises; while an inductive approach involves the learners detecting patterns and working out the grammatical rules by themselves. Amid the deductive approaches used in Gran Canaria, the Grammar-Translation method must be mentioned as this was the method used in the Seminary to teach the different languages. As Blanton states 'since antiquity, scholars had spoken a national or regional vernacular but read and wrote in scholarly languages such as Hebrew, Greek, or Latin;' that was the case in the Seminary in Las Palmas de Gran Canaria where teachers and students spoke Spanish but read especially Latin, but also Hebrew, Greek, French, English, German or Arabic²². Blanton explains that

¹⁹ *Ibid.*, p. 128.

²⁰ Canarian Museum. File ES 35001 AMC/CSA.

²¹ Viña Rouco, *Metodología inductiva y deductiva en la enseñanza de lenguas vivas en España en el siglo XIX*, cit., pp. 188-189.

²² C.K. Blanton, *The Rise of English-Only Pedagogy: Immigrant Children, Progressive*

«it was quite natural for scholars to develop bilingual-biliteral techniques of teaching languages that consisted entirely of reading and translating academic languages into vernacular form»²³.

The principal characteristics of the Grammar-Translation methods were that the students learnt a language in order to read its literature or benefit from the mental discipline that resulted from foreign-language study; reading and writing were the major focus and little attention was paid to speaking or listening; the vocabulary selection was based solely on the reading texts used, and words were memorized; the sentence was the basic unit of teaching and language practice; accuracy was emphasized; grammar was taught deductively and the student's native language was the medium of instruction. That meant that students were taught in their mother tongue the grammar rules and vocabulary they had to study by heart to be able to translate sentences from the foreign language they wanted to learn to their native language and vice versa²⁴.

Rooted in the Spanish foreign language teaching, the Grammar-Translation method has been used -and it is still used by some professionals- to teach modern languages. Its success and prevalence in Spain can be attributed, on the one hand, to the fact that for a non-native teacher a method with no listening or speaking exercises is very convenient and, on the other hand, to the compulsory teaching of Latin in Spanish high schools until the 20th century, getting language students used to analysing language instead of using it to communicate. Teachers with no real proficiency in the language feel they control the lesson provided they had the translation prepared in advance; while students while students were accustomed to learn languages that way and did not see the need to talk. Although nowadays we want learners to communicate and «think» in the target language, translating is an excellent tool to make them aware of the differences between the mother tongue and the foreign language. That could be the reason for the renewed appearance of translation exercises in modern textbooks.

However, towards the mid-nineteenth century several factors contributed to a questioning and rejection of these principles. Oral proficiency in foreign languages was demanded and a new type of language student appeared. These new students could not learn languages in a traditional way because they did not attend secondary school and their grammatical knowledge was very limited. 'Practical and easy' methods such as Ahn's and Ollendorff's were an enormous success. Those methods were mainly aimed at adults and their textbooks (compared to the ones written by Tiarks and Weisse, used at secondary schools)

Education, and Language Policy in the United States, 1900-1930, in B. Beatty, E.D. Cahan and J. Grant (edd.), *When Science Encounters the Child*, New York, Teachers College Press, 2006, p. 60.

²³ *Ibid.*

²⁴ J.C. Richards, T.S. Rodgers, *Approaches and Methods in Language Teaching*, Cambridge, Cambridge University Press, 1986, pp. 3-4.

seemed «lightweight and in need of improvement»²⁵. And they were certainly lightweight and really small, but with many advantages.

A key word when talking about methods is the term «practical», as it appears in many of the advertisements I worked with. What we understand by practical today is not what was understood by that term in the nineteenth century. According to Howatt, «to us practical is more or less a synonym for useful but in the nineteenth century a practical course was also one which required practice»²⁶. This means that, when in many of the advertisements they used the term practical, it could refer to written exercises designed to provide practice. Nowadays, the concept of practical is used to refer to courses which offer a communicative approach and help students to develop their speaking abilities.

Nevertheless, there are advertisements where the term *conversación* appeared and many teachers proudly announced themselves either as native speakers or as having lived abroad for a long period of time. It seems only logical to think that the revolution in the teaching of modern languages that had been taking place abroad could also have taken place in Gran Canaria, where public demand for learning how to speak a language could be motivated by the increase of tourism, business relations, ecc.

Ahn's, Ollendorff's, Chantreau's and Father Lerchundi's were a great improvement from the Grammar-Translation method. Even though they were deductive approaches, the grammatical rules were simpler and lessons were intended to be closer to the students' communicative needs. By and large, both deductive and inductive methods were taught in the island at that time. The teacher's proficiency affected the choice of method with Gouin's inductive Method of Series being used mainly for private tuitions. This is consistent with Viña Rouco's studies on foreign language teaching in Spain in the nineteenth century.

Ollendorff's method

Ollendorff (1803-1865) published his *New Method of learning to read, write and speak a language in six months* in 1835. The class procedure was as follows:

- a. The lesson will start by correcting the homework and asking students questions about the unit.
- b. Then, a new lesson will be dictated to the students and these will pronounce each word as the teacher says it.
- c. Afterwards, the teacher will ask questions about the lesson.

²⁵ A.P.R. Howatt, *A History of English Language Teaching*, Oxford, Oxford University Press, 1991, p. 139.

²⁶ *Ibid.*, p. 132.

d. Finally, the teacher will ask more questions about the previous lessons²⁷.

Lessons were very simple; they consisted of a grammar pattern with its translation into the student's mother tongue, some vocabulary to practice that pattern and an exercise to practice that grammar and vocabulary by translating some sentences.

According to Fernández Menéndez, the main features of this method are that languages were taught in order to be spoken, rules were simple and short, grammar and syntax are explained to the student once he had practiced the sentences²⁸, Ollendorff linked the different parts of the sentence, the student had to express himself in the target language from the beginning to get used to thinking in that target language, the answers are included in the questions, and the easy sentences from the beginning turned into complex positive, interrogative and negative sentences.

While for Howatt²⁹, the two original features of interest of this method are:

1. His system of linguistic gradation. For this author, Ollendorff was the first one to use the gradual presentation of linguistic difficulties. The new grammar points were introduced one by one.
2. A curious theory of interaction, his cue system, which means that the answers to the questions the teacher asked the student are included in the very questions, so the students could easily answer them. The exercises on the textbook would consist of a list of questions and answers to be translated to the target language. There is no other type of exercise, and «since these question-answer sequences are unnumbered, they merge together into a kind of manic interrogation»³⁰.

Ollendorff's method was unusual and fresh, especially compared to the traditional grammar classes. His desire to be practical was considered very highly at the time, but he was especially criticized for the absence of grammar in his textbooks. Current foreign language learners would find this method old-fashioned and repetitive, but Ollendorff was in favour of natural methods and used his long teaching experience in his own method. While lessons usually consist of grammar patterns and some vocabulary to practice the grammar, he stressed the importance of using the language to speak and, from the very first lesson, included forms of conversational discourse to provide students with the tools to ask and answer questions from the beginning. Ollendorff's lessons

²⁷ A. Sánchez Pérez, *Historia de la enseñanza del español como lengua extranjera*, Madrid, Sociedad General Española de Librería, S.A., 1992, p. 213.

²⁸ M.A. Fernández Menéndez, *Métodos para la enseñanza del inglés durante el siglo XIX y primera mitad del siglo XX*, <https://www.um.es/tonosdigital/znum21/secciones/estudios-12-ensenanza_ingles.htm> (last access: 16.12 2012), p. 1.

²⁹ Howatt, *A History of English Language Teaching*, cit. pp. 141-145.

³⁰ *Ibid.*, p. 143.

resemble the Audio-Lingual drills completed with a grammar-translation exercise.

As to the opinion of the specialists in the field on this method, while Howatt³¹ and Titone³² consider that the main mistake of this method was his principle of building artificial sentences to illustrate a grammar rule, Sánchez Pérez considers that the class procedure is similar to the twenty-century Audio-Lingual Method and states that «from the operational point of view, the Ollendorff method is novel and is clearly delineated. Not only does it seem simple, but it is. Although for reasons of common sense, teachers usually take into account the problem of simplicity-complexity when planning their teaching, this approach does not explicitly appear in textbooks until Ollendorff mentions it in his method»³³.

Although Ollendorff and Ahn's methods were both created to be used in schools, their reputation as lightweight and the high level of sales of their key-book suggest that the main buyer of these methods was the adult student, who studied by himself with or without the teacher's help. Normally, teachers would use the adaptation of this method according to the students' mother tongues. For example, for Spanish students there was *Gramática francesa y método para aprenderla: Ollendorff reformado* by Eduardo Benot. Benot was the Spanish linguist who introduced this method in Spain between 1851 and 1854, adapting the Ollendorff French textbook for the teaching of English³⁴. In Las Palmas, the version of the Ollendorff method used at San Agustín School and at the Local High School to teach English and French and for private lessons was usually Benot's textbook.

Ahn's method

Although not specifically mentioned by name, it is very probable that Ahn's *A New, Practical and Easy Method* (1849) was used in Gran Canaria. Firstly, as there are numerous references to a McVeigh in the English syllabi of the Local High School in Las Palmas and H. McVeigh adapted this method for Spanish speakers and, secondly, because some advertisements in the local press referred to a practical and easy approach which pays special attention to correct pronunciation, which seems to refer to the title of the book and its concern with pronunciation.

³¹ *Ibid.*, p. 145.

³² R. Titone, *Teaching Foreign Languages: An Historical Sketch*, Washington, D.C., Georgetown University Press, 1968, p. 28.

³³ Sánchez, *Historia de la enseñanza del español como lengua extranjera*, cit., p. 215, my translation.

³⁴ Fernández, *Métodos para la enseñanza del inglés durante el siglo XIX y primera mitad del siglo XX*, cit., p. 1.

This method was both «easy and practical». After a brief introduction to the pronunciation, the basic learning materials are distributed in short and consecutively numbered sections. Odd-numbered sections include a grammatical summary and around twelve new vocabulary items, followed by a set of sentences to translate into the mother tongue. Even-numbered sections contain sentences to translate into the target language, but there are no new teaching points. The student of this method is required to have a basic level of grammatical terminology. The selected vocabulary is quite useful and the sentences set for practising are short and easy to translate, although a bit boring. There are not many new words in each lesson and there is a lot of practice³⁵.

According to Sánchez Pérez the organization of the book in short lessons promotes concentration on one problem at a time, bringing together the entire vocabulary and phrases that make up the subsequent practice, and sees some selection criteria and some type of organization of the materials that were unusual at the time³⁶. However, when analysing the learning and teaching of French in Spain between 1767 and 1936 Fernández Fraile criticises that «learning the language is reduced to a continuous, repetitive, unconscious, even mechanical practice, it virtually eliminates all reflective processes, without any explanation prior to the memorization of the rules, with imitation and repetition as the only faculties put into practice»³⁷.

As Ollendorff, Ahn believed his to be a natural method which means learning a language in a similar way as a child learns his mother tongue; his motto was «to learn the foreign language as you learned your mother tongue». Students were to learn the language by repeating the same words many times and combining them imperceptibly. However, his books are full of grammar explanations and translation exercises to and from the target language. Likewise, the vocabulary included in the lessons is a mixture of different parts of the sentence with no logical coherence.

When comparing Ollendorff and Ahn's methods, Howatt explains that «Ahn's textbooks follow a method that is largely the result of his intuitive feeling for simplicity; they proceed one step at a time, with not too many words in each lesson, plenty of practice, and so on. With Ollendorff, however, there is a much more deliberate approach to textbook planning and the organization of materials and practice activities»³⁸.

³⁵ Howatt, *A History of English Language Teaching*, cit., pp. 140-141.

³⁶ A. Sánchez Pérez, *Los métodos en la enseñanza de idiomas. Evolución histórica y análisis didáctico*, Madrid, SGEL, 1997, p. 100.

³⁷ M.E. Fernández Fraile, *La enseñanza/aprendizaje del francés como lengua extranjera en España entre 1767 y 1936. Objetivos, contenidos y procedimientos*, Barcelona, Universidad de Granada, 1996, p. 324.

³⁸ Howatt, *A History of English Language Teaching*, cit., p. 141.

Chantreau method

Another method in demand in the nineteenth century, although mainly in Spain, was the Chantreau Method. Born in Paris in 1741, Pierre Nicolas Chantreau was a teacher of French in Spain and the author of numerous works of various genres, including *El arte de hablar bien francés*, the art of speaking French well.

This textbook soon became very popular at Spanish schools. According to Moreu Huet, his success was due mainly to the clarity of his exposition, the abundance of examples, entirely new parts and the strong unity of the book³⁹. To these advantages, Fernández Fraile adds two important notions: the view of practising the language as a means to acquire it and the fact that the verb was not conjugated in isolation, but within a sentence⁴⁰.

The textbook was divided into four sections: pronunciation, spelling, the parts of the sentence and its properties, that is, the syntax, and a French-Spanish lexicon. It can be considered as a grammatical practical method because it was meant to be practical, that is, useful, instrumental, and the grammar is taught by doing the exercises. Each unit consists of some rules (either grammatical or phonetic) and some sentences in both languages. Chantreau did not only include the grammatical rules, but also some pragmatic contents comparing French with Spanish. Hardly innovative, this method has the advantage of clarity and thoroughness. Besides, as it was designed with a Spanish audience in mind, there are many cases of comparative linguistics to help the readers understand the examples better.

This textbook was used at the San Agustín School. In a syllabus for the subject of French dated October 17, 1845 and signed by D. Miguel Ripoché, we found references to Chantreau's French grammar, the fables by La Fontaine, a French dictionary by Nuñez Taboada and *Les Aventures de Télémaque* (1699), a sequel of the *Odyssey*, written by the French Archbishop, theologian and man of letters François de Salignac de La Mothe-Fénelon⁴¹.

In the syllabus for French for the same school for the year 1861-62, we find the names of Bergnes de las Casas and La Verdure. Antonio Bergnes de las Casas, the grandson of French emigrants, was an editor, author of several philological works and professor of Greek at the University of Barcelona where he also held the position of Vice-Chancellor. He reviewed *El arte de hablar bien francés* on several occasions, the first of which was in 1845. As regards to La Verdure, it is not clear who he was. On the one hand, there is a book called *El*

³⁹ N. Moreu Huet, *Pierre-Nicolas Chantreau (1741-1808) et sa grammaire*, Barcelona, Publicacions Universitat de Barcelona, 1990, p. 229.

⁴⁰ Fernández, *La enseñanza/aprendizaje del francés como lengua extranjera en España entre 1767 y 1936. Objetivos, contenidos y procedimientos*, cit., p. 343.

⁴¹ Viña Rouco, *The Teaching of Foreign Languages in Europe: A Historical Perspective on Foreign Language Teaching in Spain*, cit., p. 269.

Maestro Francés, a Franco-Spanish grammar written by Justino E. Laverdure and published in 1858⁴². Justino E. Laverdure, according to the cover of the same book, was a professor of languages and various sciences, director of the literary university in Madrid and professor of French at the Royal Scientific Industrial Seminary in Vergara. A less likely possibility would be that the La Verdure mentioned in the syllabus was Brother Jerónimo de la Verdure, a French cleric, author of a book of translations from French into Spanish⁴³.

In regards to these three grammatical methods, many factors affected their adoption and popularity in the schools. With foreign language teaching being implemented in the school system, grammar was the ideal basis for teaching. Indeed, it provides a clear model and makes correction easy. It is relatively easy to teach the foreign language grammar at school, even by those who do not speak the language. This factor was important because, with the expansion of the school system, there was a lack of instructors who were able to teach the language orally.

Father Lerchundi's method for Arabic

The Rudiments of Vulgar Arabic by Father Lerchundi is an interesting method, which was very popular in the nineteenth century. Father Lerchundi, a Spanish Franciscan missionary, was a distinguished diplomat, friend of the Sultan Moulay Hassan and a leading man of Spanish politics in Morocco, participating in several embassies.

Practical and methodical, Father Lerchundi boasts of being able to avoid the annoying repetitions which were typical of Ahn's and Ollendorff's methods. From the beginning, he recommends a native teacher who could pronounce properly. The student had to learn the words underlined in the exercises by heart. Firstly, the teacher reads the corresponding exercise very slowly while the student repeats the word. Then, the teacher covers the column on the left and the student translates the word into Spanish. Next, the student writes the lesson and afterwards, the teacher asks the student about the lesson, either in Arabic or Spanish, while the student translates it. Finally, the teacher asks about the lesson's grammar rules. Father Lerchundi gives a final piece of advice: «the student will have to socialize with native speakers and pay attention when they speak Arabic».

⁴² Fernández, *La enseñanza/aprendizaje del francés como lengua extranjera en España entre 1767 y 1936. Objetivos, contenidos y procedimientos*, cit., p. 280.

⁴³ Á. González Palencia, *Eruditos y libreros del siglo XVIII*, Madrid, Consejo Superior de Investigaciones Científicas, 1948, p. 427.

Although the translation part of the lesson was hardly new, in this method the learner listens to the sounds before seeing the words in writing. Moreover, he needs to make a conscious effort as he is requested to study and learn the words by heart and repeat them. Lerchundi emphasized the importance of the aural skills with the clear aim of teaching Arabic to speak and to be able to understand Arabic speakers and, contrary to the other Arabic grammars of the time, he stressed the fact that his book was meant to teach the spoken Arabic of the time. This explains why his method was so popular with Canarian traders in Morocco.

The Series method

In 1880, the Frenchman Francois Gouin produced his *L'Art d'enseigner et d'étudier les langues*, later translated into English by Howard Swan and Victor Bétis in *The Art of Teaching and Studying Languages* (1892). According to Gouin, the structure of the linguistic text reflects the structure of the experience, and that experience could be described as a sequence of smaller events. Introducing the new vocabulary and grammar points in a sequence helps the student to understand the new words and to remember them easily. He also believed that using this series of events was some kind of motivation in itself⁴⁴.

The procedure used in Gouin's series is the following:

- a. The teacher explains in the native language the general content of the scene or topic.
- b. He enacts the events, describing in the foreign language what he is doing.
- c. The single acts are then divided, and again enacted.
- d. All this is done first orally, then in writing. There are from 18 to 30 sentences in a selection. Fifty selections constitute one series. Several series combine to form one general series, and there are five of these: the home, man in society, life in nature, science, and occupations⁴⁵.

The opinions of different experts in this method are varied. In *Teaching Foreign Languages*, Titone mentions three positive aspects:

- a. Intense activity through dramatization of the sentences to be drilled,
- b. His ingenious classification of activities into what Ovide Decroly later called «centres of interest», which meets not only the child's need for activity, but also its need for concrete and familiar experience,
- c. His use of complete sentences anchored in true-to-life situations⁴⁶.

⁴⁴ Howatt, *A History of English Language Teaching*, cit., pp. 161-162.

⁴⁵ Titone, *Teaching Foreign Languages: An Historical Sketch*, cit., pp. 34-35.

⁴⁶ *Ibid.*, pp. 36-37.

On the other hand, this author mentions several methodological weaknesses due to the following reasons:

- his opposition to phonetics, reading and written exercises;
- his recommendation of a large vocabulary, not graded by difficulty or frequency;
- he distrusted realia and pictorial representation;
- the exaggerated analysis of speech and behaviour into 'micro-segments';
- the excessive use of translation (especially in the early stages).

Although mimicry and acting had occasionally been tools in language teaching, not until Gouin did mimicry become an essential part in teaching. That concept suggests that the association between meaning and an activity is stronger if the action is performed while it is being described. Using mime and gestures in class is one of the most controversial points of this method and while for some experts the use of this teaching tool was an advantage, others believe that the method relies on the teacher's lack of self-consciousness and willingness to repeat the gestures and actions in class⁴⁷. The use of gestures and actions would later become part of such approaches and methods as Palmer and Hornby's Situational Language Teaching and James Asher's Total Physical Response⁴⁸. According to Kelly, Gouin anticipated Palmer's «spatialization» concept by which a word is learned in relation to the place where it was learned. Gouin seems to have been the first to realize that the scope and the diversity of its use could justify the inclusion of a word in the language course⁴⁹.

Howatt's main criticism is that the book is repetitive and that there are too many sentences in the third person. Although the series is weird, he thinks that «in its own curious, almost hypnotic, way it works»⁵⁰. Likewise, Sánchez Pérez mentions as positive aspects that grammar is no longer the central point of the language class; the fact that, due to the logic of the sequences, the student can understand and predict what comes next; the importance of the verb and that in the textbooks that follow the grammar rules, vocabulary lists and translation exercises disappeared⁵¹.

Gouin's series method was surprising, original and innovative. Its methodology required a kind of teacher who was willing to move and act in class, but also he also had to master speaking and pronunciation. When most foreign language lessons consisted of translating sentences from one language into another and written exercises, there were teachers in the 19th century ready to try new ways of teaching. Gouin believed that his method was natural and

⁴⁷ L.G. Kelly, *25 Centuries of Language Teaching*, Rowley, Newbury House, 1969, p. 115.

⁴⁸ Richards, Rodgers, *Approaches and Methods in Language Teaching*, cit., p. 6.

⁴⁹ Kelly, *25 Centuries of Language Teaching*, cit., p. 202.

⁵⁰ Howatt, *A History of English Language Teaching*, cit., p. 163.

⁵¹ Sánchez, *Los métodos en la enseñanza de idiomas. Evolución histórica y análisis didáctico*, cit., p. 100.

that by connecting movement and speech, students would learn the target language the way babies do when they talk to themselves. The choice of scenes is often strange, but in later versions of the method the chosen topics for the lessons were related to the needs of the exclusive minority of people who could travel and needed to speak a foreign language at that time. For this author, it was more important to learn sentences related to a specific topic than to study isolated words or grammatical concepts and, even though some sentences and situations are outdated, his methodological principles are still present in the teaching of modern languages in the 21st century.

Concluding remarks

While there is some research on issues such as the history of the teaching of Spanish as a foreign language, the implementation of a particular method for teaching French in Spain or the history of a particular school where some foreign language was taught, there has been no previous research on the teaching of several foreign languages in the same area in a specific period of time. This research on foreign language teaching in the 19th century in Gran Canaria has been possible thanks to the preservation of many of the school curricula and the 19th century-newspapers in the archives of the island and the existence of previous studies on the history of certain schools, which have been important sources for our purposes.

In the island of Gran Canaria in the nineteenth century, deductive and inductive methods were used to teach several foreign languages. English, French, Italian, German and Arabic were taught at public and private schools and the methods used varied according to the type of centre, the language that was being taught and the teacher. For that reason we can find traditional methods such as the Grammar Translation method, but also more modern ones such as the Ollendorff and the Ahn methods or the original inductive Gouin's Series method.

Both innovation and tradition were combined in the teaching of modern languages in Gran Canaria in the nineteenth century. For many years, the Seminary was the only high school in Gran Canaria, not only for would-be priests, but also for boys who wanted to continue their studies at the universities in peninsular Spain or abroad. At the Seminary, they studied Latin and Greek as part of their theological studies; in addition, Hebrew, Arabic, French, German and English were also taught for some years as seen in the syllabi kept in the Canarian Museum. As the traditional method to teach Latin and Greek for centuries has always been the Grammar Translation method, it is very probable that same method was used in teaching foreign languages at this school. They

did not need those languages in order to speak but just to read, as they merely wanted to be able to read literature in the target language.

But learning grammar and vocabulary to read the classics in those languages was not enough for the people who wanted to be able to serve a customer, write a business letter, travel abroad or understand an opera, among other possible purposes. To accomplish such aims, instructors looked for other ways of teaching languages and those were the grammatical practical methods, very popular at the time, such as the Ollendorff, the Ahn or the Chantreau methods. These methods were basically an improvement when compared to the Grammar Translation, but still they were deductive. Each lesson was composed of one or two grammatical rules at the most, while the vocabulary was usually limited to a certain semantic field. Many of these textbooks were meant for adults studying on their own, and for a particular type of student. Most students were affluent people who needed the language to travel abroad comfortably, which means they wanted to be able to book a room, get on a train, order from a menu, pay a visit, and meet and talk with people of the same social status. Therefore, some textbooks were designed to supply these needs.

The Ollendorff method was used to teach English and French at the Business School, later the Local High School, while the Chantreau method for French was used at San Agustín, the most important private school in the capital of the island; however, it is not clear which method was used there for teaching English, although it was probably Eduardo Benot's version of the Ollendorff method. Finally, the Gouin method of Series was offered in the local press to teach private lessons in English. As mentioned above, this was a very peculiar and strangely modern method which joined the idea of kinaesthetic memory, e.g. doing the action while saying it aloud, and the concept of key words, in this case, the main verb of the sentence. An inductive method, in the Method of Series students were not taught any grammatical rules but sentence patterns they had to repeat with their teacher.

At a time when the educational level of the general population in the islands was very deficient, the interest and concern of a particular sector of the population in learning foreign languages was such that it created a demand not only for teachers but also for new methods to teach those languages. In a century with so much innovation, it was only natural to try new ways of teaching a foreign language, but we also find some inertia as it is easier for teachers to continue using the methods with which they learned. What a teacher has learned from his own experience as a student first and as a teacher later is part of what he then translates to his students. Innovation and tradition are very much intermingled in language learning.

Because of its location between Europe and America, through its port, the city of Las Palmas de Gran Canaria was aware of the latest innovations in the field of language teaching. Either to talk to tourists, trade with Morocco, read French, German or English literature, or understand Italian opera, learning

a foreign language was a prestigious and sometimes necessary activity. An increasingly important tourist sector, the prestige of speaking another language, the strong bonds of a portion of the population with the different nationalities of origin of their families all contributed to the promotion of foreign language teaching in Gran Canaria in the 19th century.

Newspapers printed in the island of Gran Canaria from 1854 to 1899

Las Afortunadas (1873-1874)
 La Alborada (1899)
 El Bombero (1869-1870)
 La Brújula (1874)
 La Campaña (1899)
 Las Canarias (1870)
 El Canario (1854/1859-1860/1881-1882/1893)
 El Comercio (1882-1883/1892-1893)
 La Correspondencia (1876-1882)
 El Cronista (1883/1897-1898)
 La Defensa (1871-1872/1892)
 El Defensor de la Patria (1893-1896)
 Diario de Las Palmas (1895-1899)
 El Eco de Gran Canaria (1868-1869)
 Las Efemérides (1899)
 España (1897-1899)
 El Faro Católico de Canarias (1879)
 La Federación (1869-1874)
 El Fígaro (1898)
 El Guiniguada (1873)
 La Gran Canaria (1876)
 El Imparcial (1868-?/1880/1891)
 El Independiente (1878-1881)
 La Independencia de la Patria (1884)
 El Jaleo (1885)
 Juan Lanás (1899)
 Juventud (1899)
 El Látigo (1881)
 EL Liberal (1883-1893)
 El Librepensador (1885)
 La Localidad (1879-1882)
 El Nene (1886)
 El Noticiario de Canarias (1884-1885)

El Noticiero (1880/1889)
El Noticiero Religioso (1877)
La Opinión (1872-1873)
El Ómnibus (1855-1868)
El País (1863-1869/1888-1890)
La Patria (1891-1899)
El Popular (1873-1874)
La Prensa (1874-1878)
El Pueblo (1881-1885)
La Reforma (1856-1858)
La Revista de Las Palmas (1884-1888)
El Siglo XIX (1883-1884)
Sin Título (1898)
El Telégrafo (1885-1899)
El Telegrama (1897)
El Tiempo (1898)
El Trabajo (1885-1887)
El Tradicionalista (1887)
La Vanguardia (1895)
La Voz del Pueblo (1896-1987)
La Verdad (1870-1875/1891/1899)

German classical philologists at Russian Universities in the 1840s-1850s*

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ABSTRACT: The article describes the adaptation in Russia of the new methods of teaching and research developed by German classical philologists. In the 1830s they were introduced to Russian universities by students and graduates returning from traineeships abroad and by visiting German scholars. Drawing on documents from archives of Kazan and Moscow universities as well as those of the Ministry of Education, the author shows how methods of teaching, reviewing, discussions in faculty council meetings and theses defenses influenced the quality of Russian classical philology.

EET-TEE KEYWORDS: University; Classical philology; History of Education; Russia; XIXth Century.

On September 24, 1854 acting adjunct professor of Kazan University Boris Ordynskii, who had just defended his master's thesis in Greek literature, wrote in a letter to his former fellow Moscow University student and then St. Petersburg orientalist Kajetan Kossowicz: You will, of course, agree that classical philology must take a peculiar character in our country and that Western Europe has not done everything, as far the ancient world is concerned. [...] It is sad to see [...] that nowadays the wonderful Greek language is not taught here at all. And you can guess how it used to be taught by a German: instead of observing the affinity between Greek and Russian and thus getting to love our language, a treasure we have every right to be proud of in face of all Europeans, the students would listen to dry collations of forms and to erroneous explanations of various foreign scholars, the meaning of which was completely opaque to them¹.

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¹ Russian State Historical Archive (RGIA), f. 733, inv. 46, file 186, fol. 13-13 v.

What was the young philologist's assessment based on? How was classical philology studied and taught at Russian universities? What was the role of scholars from Germany in this process? This article is an attempt to answer these questions.

The first half of the nineteenth century has been described by researchers as a time when the 'Russian antiquity studies' were born and developed into a scholarly discipline. The two factors behind this process were the archaeological discoveries made in the south of the Russian Empire and the transfer of methods and techniques of the German classical philology and philosophy².

The early nineteenth century saw a process of professionalization of classical philology in Germany accompanied by heated debates over the subject matter on which representatives of this discipline should focus. As a result, two kinds of classical philology developed: a grammatical and critical («philology of words») and a historical one («philology of things»). The leading roles in the disputes were played by university professors such as Friedrich August Wolf in Halle, August Boeckh in Berlin, Karl Otfried Müller in Göttingen, and Johann Gottfried Jakob Hermann in Leipzig. Research seminars became a typical training setting for philology students after Boeckh organized the first such seminar at the newly-founded University of Berlin in 1810, which became the model for other German universities. The professional standards for philology were set by book reviews. Professors Karl Konrad Friedrich Wilhelm Lachmann, August Boeckh, Karl Otfried Müller, Johann Gottfried Jakob Hermann «always acted as critics, reviewers and guardians of philological standards»³. As a result, according to the historian of the discipline R. Steven Turner, classical philology «was 'reappropriated' by the professional avant-garde and their pupils who

² E.D. Frolov, *Russkaia nauka ob antichnosti* [Russian antiquity studies], St. Petersburg, Izdatel'stvo Sankt-Peterburgskogo gosudarstvennogo univerviteta, 1999, p. 112. See also: A.D. Veisman, *Uspekhi grecheskogo iazyka i literatury v Rossii za poslednee dvadtsatipiatiletie* [The success of the Greek language and literature in Russia over the last twenty-five years], «Russkii vestnik», n. 4, 1880, pp. 434-466.

³ R.S. Turner, *Istorizm, kriticheskii metod i prusskaia professura s 1740 po 1840 god* [Historicism, Kritik, and the Prussian Professoriate, 1790 to 1840], «Novoe literaturnoe obozrenie», n. 82, 2006, <<http://magazines.russ.ru/nlo/2006/82/te3.html>> (last access: 18.07.2016). On the history of classical philology, see: A. Grafton, *Ot poligistora k filologu (kak preobrazilas' nemetskaia nauka ob antichnosti v 1780-1850-e gody)* [Polyhistor into Philolog: Notes on the Transformation of German Classical Scholarship, 1780-1850], «Novoe literaturnoe obozrenie», n. 82, 2006, <<http://magazines.russ.ru/nlo/2006/82/gr4.html>> (last access: 18.07.2016); G.W. Most, *Vek stolknovenii: kak nemetskie antikovedy XIX stoletia uporiadochivali svoi debaty* [One Hundred Years of Fractiousness: Disciplining Polemics in Nineteenth-Century German Classical Scholarship], «Novoe literaturnoe obozrenie», n. 96, 2009, <<http://magazines.russ.ru/nlo/2009/96/gl5.html>> (last access: 07.18.2016); C. Trautmann-Waller, *Filologiiia veshchei ili filologiiia slov? Istoriia odnogo spora i ego segodniashnie prodolzheniia* [Philology of things or philology of words? The history of one dispute and its contemporary continuation], «Novoe literaturnoe obozrenie», n. 96, 2009, <<http://magazines.russ.ru/nlo/2009/96/se6.html>> (last access: 18.07.2016).

ousted from it those who were unable or not willing to adapt to the new criteria of competence»⁴.

In the early nineteenth century, Russian intellectuals' enthusiasm for the antiquity manifested itself in arts and literature as well as in numerous Russian translations of ancient literary texts accompanied by discussions on how to best translate the ancient epic poets⁵. The transformation of an amateur interest into a scholarly field of research and an academic discipline in the early 1830s is associated by modern historians of science and education with the name of the President of the Academy of Sciences and Minister of Education Sergei Uvarov. He was a well-known Hellenist who published his works in Russian and in French and was in contact with European scholars. Transferring to Russia the European model of secondary education based on the study of classical languages, Uvarov created a system of general education and relentlessly promoted antiquity studies in the Russian Empire⁶.

In 1843 in a paper titled «The Decade of the Ministry of Education», Uvarov explained his addiction:

Both the experience of many centuries and the examples of the most educated nations show the classical learning to be the most excellent and efficient way of such [i.e. all-round – K.I.] intellectual development. For this end, when reforming the curriculum for institutions of the Ministry of Public Education, the teaching of classical languages was increased inasmuch as it was required and allowed by the general proportionality. Trying to attract [students] to the study of Greek language and literature, the ministry was guided not only by the conviction that this was proven to be a superior method of intellectual improvement, but also that it was necessary to establish the modern Russian education more solidly and profoundly on the fundament of the ancient education of a nation from which Russia received both the holy doctrine of faith and the first elements of her education⁷.

In 1828, primary and secondary schools were reformed. Greek and Latin were introduced at grammar schools. In 1835, a new university statute was adopted, according to which three new chairs – one for the Greek language and antiquities, one for the Latin language and antiquities and one for the universal history – were established at the Department of History and Philology, which was part of the Faculty of Philosophy.

⁴ Turner, *Istorizm, kriticheskii metod i prusskaia professura s 1740 po 1840 god*, cit.

⁵ Frolov, *Russkaia nauka ob antichnosti*, cit., pp. 112-125.

⁶ C.H. Whittaker, *Graf Sergei Semenovich Uvarov i ego vremia* [Count Sergei Uvarov and his time], St. Petersburg, Gumanitarnoe agentstvo «Akademicheskii proekt», 1999, pp. 167-168; E.D. Frolov, *Graf Sergei Semenovich Uvarov i akademicheskii klassitsizm* [Count Sergei Uvarov and academic classicism], in *Peterburgskaia akademiia nauk v istorii akademii mira: k 275-letiiu Akademii nauk* [Petersburg Academy of Sciences in the history of the academies of the world: to the 275th anniversary of the Academy of Sciences], St. Petersburg, 1999, vol. 2, pp. 275-285.

⁷ S.S. Uvarov, *Izbrannye trudy* [Selected works], Moscow, Rossiiskaia politicheskaia entsiklopediia, 2009, p. 359.

Following the academic personnel reform of the late 1830s⁸, a number of 'antiquity chairs' at universities was headed by young philologists and historians who belonged to the first and the second generations of the Dorpat Professorial Institute graduates (Vladimir Pecherin and Dmitrii Kriukov at Moscow University, Alfons Walicki and Mikhail Lunin in Kharkov, Mikhail Kutorga in St. Petersburg)⁹ or were scholarship holders (e.g. Arsenii Menshikov, Ivan Neukirch). All of them had spent two or three years of training at universities in Germany, mainly in Berlin, attending lectures and seminars of leading German classical philologists.

Moreover, Theodor Friedrich Freytag, a graduate of the University of Dorpat and an Odessa Richelieu Lyceum professor, was transferred to the St. Petersburg University. At the end of the 1830's, visiting professors from Germany Karl Hoffmann (Karolus Hofman Hesus) and Friedrich Vater were appointed to the chairs of Greek literature and antiquities at Moscow and Kazan. These two professors were the only university instructors invited from abroad.

Whereas the performance of Russian antiquity students returning after internships in Germany has come to the attention of researchers and become a source of pride in the Russian academia history, the impact of the invited German scholars on the development of Russian classical philology has been largely passed over. The point to be made here is that through their teaching, their reviewing of doctoral and master's theses, these German scholars transferred to Russia the disciplinary rules and conventions adopted by classical philologists in Germany.

Friedrich Vater (1810-1866), professor of Greek literature and antiquities at Kazan University, was perhaps one of the brightest and most unjustly neglected figures among them¹⁰. He was the son of the Königsberg philosophy professor Johann Severin Vater and studied classical philology at the University of Berlin.

⁸ T.V. Kostina, *Professora «starye» i «novye»: «antikollegial'naia reforma» S.S. Uvarova* [The «Old» and «new» professors: «anti-collegial reform» of Sergei Uvarov], in *Soslovie russkikh professorov. Sozdateli statusov i smyslov / pod red. I.M. Savel'evoj, E.A. Vishlenkovej* [The Russian Professors, the Makers of Statuses and Meanings / ed. by E. Vishlenkova, I. Savelieva], Moscow, HSE, 2013, pp. 212-238.

⁹ Frolov, *Russkaia nauka ob antichnosti*, cit., pp. 149-174; Whittaker, *Graf Sergei Semenovich Uvarov i ego vremia*, cit., pp. 189-190; F.A. Petrov, *Formirovanie sistemy universitetskogo obrazovaniia v Rossii* [Formation of the system of university education in Russia], vol. 4 *Rossiiskie universitety i liudi 1840-kh godov* [Russian universities and the people of the 1840s], part 1 *Professura* [Professorship], Moscow, Izdatel'stvo Moskovskogo universiteta, 2003, pp. 144-153; *Istoriko-filologicheskii fakul'tet Khar'kovskogo universiteta za pervye 100 let ego sushchestvovaniia (1805-1905)* [Historical and Philological Faculty of Kharkov University for the first 100 years of its existence, 1805-1905], Khar'kov, Tipografia Adol'fa Darre, 1908, pp. 175-183.

¹⁰ J.E. Sandys, *A History of Classical Scholarship*, vol. 3, *The Eighteenth century in Germany, and the nineteenth century in Europe and the United States of America*, Cambridge, Cambridge University Press, 1908, p. 389.

The history of Friedrich Vater's invitation to Kazan is very instructive in that it shows how vacancies were filled at Russian universities during the reign of Nicholas I. In the early summer of 1839 professor of Greek literature and antiquities Sergius Mistaki retired, who had been assigned to this chair as early as 1823 by the Kazan educational district curator Mikhail Magnitskii (at that time assignments were not subject to consent of the university council)¹¹. Mistaki had no pupils and no successor. Answering the inquiry of the incumbent educational district curator Mikhail Musin-Pushkin, Minister of Education Sergei Uvarov wrote on June 29, 1839 that he «currently had in view no scholar who could take this chair» and therefore ordered «a competition to be announced to fill the vacancy»¹².

Professors of the philology department and members of the University Council reached an agreement on the requirements a candidate had to meet and published the competition notice in the press. Applicants were to submit scholarly works and specially prepared essays on Greek history and history of Greek literature by April 1, 1840¹³.

On February 21, 1840 the curator of the Kazan educational district informed the Professors Council that a German philologist named Friedrich Vater would like to take the chair at issue. In a letter to the curator the applicant wrote that he had passed his *pro venia docendi* exam in 1833 and thus obtained the right to teach ancient languages and literature. Vater, who was 30 years old at that time, listed his scholarly works, which included publications of ancient monuments, articles and reviews, and told about his motivation. The only catch was that he lacked the doctorate that was required by the university statute of 1835 to fill the post of professor. The scholar explained that his «insufficient wealth had made it impossible for him to pay the costs that taking the degree involved, but in case it was a must, he hoped he would be able to take it without encumbrance»¹⁴.

The curator sent one of Vater's articles for reading to the extraordinary professor of Russian history Nikolai Ivanov and another to the full professor of Roman literature and antiquities August Scharbe. Having received accolades from both of them¹⁵, Musin-Pushkin informed Vater that he should quickly pass his doctoral exam and asked him to send in his other works.

¹¹ Inostrannye professora rossiiskikh universitetov (vtoraia polovina XVIII – pervaiia tret' XIX veka): biograficheskii slovar' [Foreign professors of Russian universities (second half of the 18th – first half of the 19th centuries): biographical dictionary], Moscow, Rossiiskaia politicheskaia entsiklopediia, 2011, p. 113; Department of Manuscripts and Rare Books of Nikolai Lobachevsky Scientific Library of Kazan (Volga) Federal University, n. 4777, fol. 42 v.

¹² National Archives of the Republic of Tatarstan (NA RT), f. 977, inv. Sovet, file 2299, fol. 1.

¹³ *Ibid.*, fol. 1 v.

¹⁴ *Ibid.*, fol. 15

¹⁵ *Ibid.*, fol. 15 v.

Shortly thereafter, the curator received a letter from Minister of Education Uvarov who strongly recommended that the chair of Greek literature and antiquities be given to the «Berlin scholar» and son of «a famous Königsberg professor» Friedrich Vater¹⁶. Enumerating the scholarly works of the applicant, the minister mentioned also the recommendations by Professor Augustus Boeckh and Baron Alexander von Humboldt. Based on these recommendations, Uvarov thought the appointment of Vater would be a «beneficial attainment» for the University of Kazan¹⁷.

The minister's letter and Boeckh's recommendations convinced the curator that his strategy was right, and he ordered the Kazan University Council to defer the termination of the competition until June 1, 1840 in order for Vater to have time to send in the necessary papers¹⁸.

On April 18, 1840 the curator passed to the council Vater's texts and a letter from Baron Alexander von Humboldt who «while recommending him [i.e. Vater – K.I.] again as a man of excellent knowledge and moral qualities, adds that he without doubt will take the degree of doctor of philosophy when needed»¹⁹. A week later the department informed the council that the professor of Arabic and Persian languages Friedrich Franz Ludwig Erdmann and the professor of Roman literature and antiquities August Scharbe evaluated Vater's works as satisfactory²⁰, and a month later Musin-Pushkin said that the German scholar took his doctorate from the University of Halle. The curator suggested that balloting should take place²¹. Vater was appointed as full professor on July 26, 1840.

It should be noted that Vater was not the only contender for the vacant chair. On March 1, 1840, the council received a petition from the «Berlin scholar» Bernhard Kolbe. The department of literature was tasked to examine his works. On April 25, it reported that works it had considered and Kolbe's disputation in Latin, examined by professors Scharbe and Erdmann, proved «insufficient for the author to acquire the title of professor of Greek literature»²². However, the reviewers added, if the applicant could demonstrate his command of Russian, he would be able to take up the post of senior teacher at the grammar school. Later it became known that Kolbe didn't speak any Russian²³.

In mid-May, the Kazan University Council received two more applications: one from Alexander Dellen, master of philosophy and associate professor at St. Vladimir University of Kiev (sent on February 26, 1840) and one from Ivan

¹⁶ *Ibid.*, fol. 14.

¹⁷ *Ibid.*, fol. 14 v.

¹⁸ *Ibid.*, fol. 16.

¹⁹ *Ibid.*, fol. 23.

²⁰ *Ibid.*, fol. 25 v.; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 348, fol. 9.

²¹ NA RT, f. 977, inv. Sovet, file 2299, fol. 31.

²² *Ibid.*, fol. 20 v.; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 348, fol. 19.

²³ NA RT, f. 977, inv. Sovet, file 2299, fol. 21, 41.

Sinaiskii, teacher of Greek at Saratov Priests Seminary and Saratov Grammar School (sent on March 24, 1840)²⁴. Both were rejected because of the expiration of the competition²⁵.

Upon his arrival in Kazan, Vater introduced and promoted the achievements of German classical philology: he «energetically set to work raising the level of teaching of his subject at the university» and made efforts to achieve «recognition of his subject as a separate and obligatory one»²⁶.

Professor Vater worked at Kazan University for 14 years. Except for a semi-annual research trip to Germany in the years 1851-1852, he was a permanent member of the examination committee that was in charge of admission²⁷. In 1842/43 and from 1844/45 till 1850/51 he delivered lectures, and from 1843 on (following August Scharbe's resignation) he was also head of classical philology at the Kazan University Teachers' Institute²⁸ where Kleotild Tchorzewski, Nikolai Bulich and Andrei Ugianskii were among his students.

Medical students' memoirs picture Friedrich Vater as a strict teacher²⁹. Nikolai Ovsiannikov, a former student who attended his classes in the Department of History and Philology in 1850's, recalled later: «It was not from our history professors but from philologists such as Vater, Tchorzewski, and Grigorovich that we had to learn history»³⁰. The scholar was preserved in the memoirist's memory as a «strict», «talented», «fair and nice» professor³¹. He lectured in Latin and talked with his students in Latin or German (he didn't speak Russian)³². Students admired his lectures and believed it to be the main merit of their professor that

he was an absolutely self-reliant scholar. What he told us was his own opinion. [...] He was sincerely convinced of what he said, and this conviction was conveyed to the audience. [...] Vater [as opposed to the professor of Roman literature and antiquities Jacob Theodor Struve – K.I.] offered only his own things and they were all highly original. He was the kind of scholar we had always wanted³³.

²⁴ *Ibid.*, fol. 27, 29.

²⁵ *Ibid.*, fol. 28, 30.

²⁶ *Biograficheskii slovar' professorov i prepodavatelei Imperatorskogo Kazanskogo universiteta (1804-1904)* [Biographical Dictionary of professors and teachers of the Imperial Kazan University (1804-1904)], Kazan', tipo-lit. Imp. un-ta, 1904, part 1, pp. 180-182.

²⁷ NA RT, f. 977, inv. Sovet, file 3744, fol. 34 v.-35.

²⁸ NA RT, f. 977, inv. Sovet, file 3738, fol. 19 v.

²⁹ A.I. Il'inskii, *Za polstoletii. 1841-1892. Vospominaniia o perezhitom* [For half a century. 1841-1892. Memories of experiences], «Russkaia starina», vol. 81, n. 3, 1894, pp. 57-60.

³⁰ N.N. Ovsiannikov, *Zapiski studenta Kazanskogo universiteta (1851-1855)* [Notes of Kazan University student (1851-1855)], «Russkii arkhiv», n. 12, 1909, pp. 493, 516.

³¹ *Ibid.*, pp. 476, 511, 512.

³² *Ibid.*, p. 504.

³³ *Ibid.*, p. 506.

The fellow faculty members, too, respected the German colleague: «As a philologist, Vater enjoyed European fame, and our never-to-be-forgotten, talented and poetic Tchorzewski always pronounced his name with respect»³⁴.

Vater's pedagogical talent led to a sharp rise in the number and quality of master's and doctoral theses in Greek literature. Nearly all of them were critically reviewed by him – the critiques have been preserved in the archives of the Kazan University's Department of History and Philology.

It is worth noting that for Russian universities internal reviews of theses were a novelty. The very concept of thesis review (termed «opinion», «examination», «review», or «report») first appeared in an official list of academic qualification documents in the 1844 «Imperial Regulation on Promotion to Academic Degrees»³⁵ which defined the critique of a dissertation as a document that provided for master's degree candidates admission to the disputation and for doctorate candidates admission to the oral exam. While introducing professors' right and obligation to write dissertation reviews, the Regulation was silent on their form and content as well as on how to proceed with a review after its announcement, i.e. whether it was to be kept in the faculty office, or sent to the university board, to the curator or the minister, whether it should be kept in the university archives, returned to the author or given to the candidate.

Vater wrote his brief, one to two page long critiques in Latin³⁶ or in Russian. Between 1844 and 1850 he reviewed his student Kleotild Tchorzewski's master's thesis (1844)³⁷ and doctoral dissertation (1847-1848) as well as that of Nikolai Blagoveschenskii who, after graduating from St. Petersburg university, spent three years at Leipzig and Heidelberg universities and finally was sent to Kazan University for defending his theses (in 1847 and 1850, respectively), the master's theses of Alkuin and Raimund Scharbe (sons of August Scharbe, Roman literature and antiquities professor at Kazan University) and of Ugianskii (in 1845, 1847 and 1850), and the doctoral dissertation of Alkuin Scharbe (1850). The doctoral dissertation of Raimund Scharbe was reviewed in the late 1853 by professor Jacob Theodor Struve because Vater at that time was suffering from an aggravation of his mental illness (he suffered from persecutory delusion and

³⁴ NA RT, f. 977, inv. Sovet, file 3738, fol. 107 v.

³⁵ *Polnoe sobranie zakonov Rossijskoj imperii (Sobranie Vtoroe)* [Complete Collection of the Laws of the Russian Empire (Part 2)], n. 17806.

³⁶ See: NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 459, fol. 21-22 v.; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 511, fol. 6-6 v., 15; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 508, fol. 8-9.

³⁷ Unfortunately, the review of the Thorzhevskii master's thesis, despite the references in the minutes, could not be found either in the affairs of the council (NA RT, f. 977, inv. Sovet, file 2683), or in the affairs of the office of curator (NA RT, f. 92, inv. 1, file 5600).

destroyed³⁸ his own library in 1853, tearing the books into pieces and ordering to sink them the Kazanka river³⁹).

The main evaluation criteria Vater applied were independence (implying originality of discoveries made by the author), thorough knowledge of the theme (which encompassed familiarity with sources and literature), presentation logic and command of scholarly terminology⁴⁰.

A comparison between Raimund Scharbe's thesis discussion minutes and Vater's critique allows us to trace the establishment of a convention concerning the criteria of scholarly quality. For example, the minutes of January 31, 1847, contain the reviewer's remark saying that the thesis «demonstrates the author's ample erudition, his familiarity with the latest works on mythology and aesthetics as well as his study of ancient sources; the arrangement of the dissertation's parts is adequate; the style is clear; the language is correct»⁴¹. The file contains also the original three-page long «full analysis of the thesis» written by Vater on behalf of the department⁴². It is more detailed than these extracts from it, and its wording is different. Since the text bears a note saying «Received on February 5, 1847», it can be assumed that it was Vater's orally expressed opinion that was included in the minutes.

What we see in the minutes appears to be the criteria of a master's thesis scholarly quality (in this case they include familiarity with literature and source material, structure, style, and language). In his paper, Vater provided the reasoning:

In this laborious and carefully written work, the author compared Greek tragedies, some of them fully extant, others only fragmentarily preserved, seeking to make sense of and shed light on unclear, distorted and insignificant fragments. Collecting fragments by himself from sources and using the best editions [...] he succeeded in refuting many of the light-minded and unfounded opinions [...] and establishing plausible assumptions of his own on individual passages as well as on the connections between whole texts⁴³.

The reviewer specially marked «the author's diligence and erudition»⁴⁴.

Vater's review of Andrei Ugyanskii's master's thesis, written on May 21, 1850, was heard and fully included in the minutes on May 23⁴⁵. The reviewer analyzed the structure of the thesis, noted the sources used, the brevity, intelligibility and accuracy of individual chapters' conclusions. In a kind manner

³⁸ *Biograficheskii slovar' professorov i prepodavatelei Imperatorskogo Kazanskogo universiteta (1804-1904)*, cit., p. 185.

³⁹ Ovsianikov, *Zapiski studenta Kazanskogo universiteta (1851-1855)*, cit., p. 511.

⁴⁰ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 508, fol. 3; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 512, fol. 13.

⁴¹ *Ibid.*, fol. 13.

⁴² *Ibid.*, fol. 23-24.

⁴³ *Ibid.*, fol. 23 v.

⁴⁴ *Ibid.*, fol. 24.

⁴⁵ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 570, fol. 32.

he pointed out that despite the fact that the applicant «did not use the most up-to-date literature, he went fairly deeply into all the relevant sources and used them for the purpose of his study with profound knowledge and perfect clarity»⁴⁶.

Vater's disagreement with the author of the study under review did not prevent him from formulating a positive opinion on its quality. Indeed, a tolerant attitude towards someone else's point of view, a willingness to live with controversies and participate in scholarly debates were common of Vater. Anecdotes were told by students about disputes between Vater and Tchorzewski never endangering their friendship⁴⁷. While disagreeing «with many of the points» made by Blagoveschenskii in his master's thesis discussed in March 1847, Vater nevertheless emphasized his advantages, e.g. «familiarity with the latest writings on archeology; he explains competently the ideas of ancient authors that he quotes. Some of the monuments of ancient art he studied by visiting them»⁴⁸. The thesis was defended successfully.

Vater's opinion about the doctoral dissertations of Blagoveschenskii and Alkuin Scharbe recorded on March 18 and June 1, 1850 respectively, begins with the observation that both applicants undertook to investigate a «difficult issue»⁴⁹. The reviewer then proceeds to underscore the complexities of source analysis, the polarity of opinions represented in research literature on the subjects under discussion and the usefulness of both theses for the discipline as a whole. Blagoveschenskii's dissertation, Vater wrote, was «distinguished by independence»; its «author is familiar with the works of his predecessors, and in his judgment on ancient Roman tragedy he is not carried away or blinded either by exaggerated praising of some modern authors addressing the issue or by biased dispraise of others»⁵⁰. Characterizing briefly the issues dealt with in Alkuin Scharbe's thesis and emphasizing its «thorough discussion of the source's reliability» Vater highly appreciated the «correct conclusions» at which the author had arrived as a result of «comparing parallel passages» from different texts⁵¹.

The review of Raimund Scharbe's doctoral dissertation was written between April and late October 1853 by doctor of philosophy and ancient philology Jacob Theodor Struve, a graduate of Dorpat and Königsberg universities who defended both his dissertations at St. Petersburg University in 1843 and 1846, respectively. Struve's «report» began with memories of Scharbe's splendid master's thesis defense in 1847 after which the candidate fully met the

⁴⁶ *Ibid.*, fol. 32.

⁴⁷ Ovsiannikov, *Zapiski studenta Kazanskogo universiteta (1851-1855)*, cit., pp. 503-504.

⁴⁸ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 511, fol. 4

⁴⁹ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 569, fol. 7; NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 598 b, fol. 11.

⁵⁰ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 569, fol. 7.

⁵¹ NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 598 b, fol. 11.

expectations of his teachers with the doctoral thesis he presented. The reviewer was generous in his praise:

His neat and elegant Latin, his comprehensible writing style, his erudite and systematic presentation of a variety of information, and finally, his integrity in compiling and collecting all the material relating to this complicated issue and scattered over all written monuments of the ancient world inspire in us respect and satisfaction⁵².

Struve noted that in his study of «the obscurest issue of classical antiquity» Scharbe «faithfully obtained all the information on his chosen subject [...] compared with them the views of various Greek philosophic systems that later on had a more or less significant impact on the religious beliefs of the Romans [...] and made a critical use of modern scholars' studies»⁵³.

The conclusion of this review is of particular interest. Whereas earlier the final sentence in reviews stated that the applicant should be admitted to the disputation, Struve concluded his analysis with the statement that the reviewed work's «volume, its correctness and purity of style, its clarity, its precision and certainty in presenting diverse information indicates incessant hard work of a young scholar, and its perfectly well-intentioned tendency impels me to express my just opinion that it is a beneficial attainment for science»⁵⁴. It is not for nothing that Struve mentioned the candidate's «well-intentioned tendency». Apparently, this is a reaction to the Education Minister's circular letter of December 13, 1850, in which the curators of educational districts were instructed to make sure that

not only the theses' contents are well-intentioned, but also that the propositions to be extracted from them [...] have the same tendency and the due completeness, certainty and clarity so as to make ambivalent interpretations of any given phrase impossible. [...] In reviewing the theses and in monitoring their defenses avoid approving discussion of principles run against our state system⁵⁵.

Vater resigned on December 7, 1854. In late June, he went on vacation to St. Petersburg, and from there on August 25 he sent the curator his resignation request. The scholar wrote that his legs failed him⁵⁶ and that doctors recommended him not to return to Kazan. He asked the curator to pay him his annual salary and send him all the necessary documents⁵⁷.

In late October, curator Vladimir Molostvov received a letter from Minister of Education Avraam Norov who, hurrying his dismissal of Vater, wrote:

⁵² NA RT, f. 977, inv. Istoriko-filologicheskii fakul'tet, file 703, fol. 2.

⁵³ *Ibid.*, fol. 2 v.

⁵⁴ *Ibid.*, fol. 2 v.-27.

⁵⁵ *Sbornik rasporyazhenii po Ministerstvu narodnogo prosveshcheniia* [The Collection of Orders on the Ministry of National Education], St. Peterburg, 1867, vol. 3, n. 38.

⁵⁶ See: Ovsianikov, *Zapiski studenta Kazanskogo universiteta (1851-1855)*, cit., p. 504.

⁵⁷ NA RT, f. 92, inv. 1, file 6947, fol. 1-2.

On this occasion I cannot but recall the cases of inept appointments of foreigners as Greek literature professors who, without any benefit for the listeners, filled their lectures with dry comparisons of forms and confusing discussion of various foreign scholars whereas they rather should have disclosed the properties and the perfection of the Greek language show its affinity with the Russian language in order to thus arouse listeners' love and desire for a more thorough study of both languages. I commit to pay special attention to these circumstances [...] for the now vacant chair of Greek literature at the Kazan University to be given to the worthiest of Russian scholars⁵⁸.

The reason and the immediate source of inspiration for such a sharp statement on the part of the minister was a private letter of Boris Ordynskii, an acting associate at the Kazan University, that was sent to Norov by the Sanskritist Kajetan Kossowicz, head of the Public Library department of books in oriental languages. The young philologist reported a stranglehold of the «German Party» and infringement of interests of Russian scholars in Kazan, the inefficient methods of teaching the Greek language used by German professors and the need for a comparative analysis of Russian and Greek in class⁵⁹. Not only did the minister take note of these statements, but he also broadcast Ordynskii's opinion as his own recommendations.

Speaking about the harm done by Greek literature professors, Norov meant the events that took place in 1848 and were associated with the name of Karl Hoffmann, professor of Greek literature and antiquities at Moscow University who has been, as subsequently Vater, appointed on the initiative of Sergei Uvarov in 1837. According to Fedor Buslaev's memories, Hoffmann was «a German scholar, [...] still a young man, tall, stout and ruddy, with long blond hair flowing over his shoulders, a cute geek with the manners of a naive *Bursch*. He didn't speak a word of Russian and what he did with us was translating Greek classics into Latin»⁶⁰. The language barrier prevented Hoffmann from establishing relations with his students and doing good for them. «He was a gifted man and could usefully have taught the Greek language», Sergei Solov'ev pointed out, «but this German did not understand his position in the Russian university»⁶¹.

Hoffmann scandalous dismissal was associated with the reaction of the Russian authorities to the European revolutions of 1848. In the Moscow University everything happened suddenly. Fedor Buslaev recalled:

⁵⁸ *Ibid.*, fol. 9 v.

⁵⁹ RGIA, f. 733, inv. 46, file 186, fol. 11-13 v.

⁶⁰ F.I. Buslaev, *Moi vospominaniia* [My memories], <http://az.lib.ru/b/buslaew_f_i/text_1892_moi_vospominania.shtml> (last access: 18.07.2016).

⁶¹ S.M. Solov'ev, *Moi zapiski dlia detei moikh, a esli mozhno, i dlia drugikh* [My notes for my children, and if it is possible for other], <http://az.lib.ru/s/solowxew_serzej_mihajlowich/text_0410.shtml> (last access: 18.07.2016).

One day, Governor General Zakrevsky with his aide appeared in our common-room during a pause. [...] Zakrevsky said something to the inspector. The inspector approached the Greek literature professor Hoffmann who was standing between us and invited him to follow the Governor General who would like to listen to his lecture. After they left the room, we were at a loss if we should laugh or cry. Hoffmann did not speak Russian, he lectured in Latin and translated texts from Greek into Latin with his students. How could Zakrevsky follow his lecture without understanding a word of these languages? In the evening I learned that Hoffmann was arrested, and a day later he was removed from the country under guard. Police investigators had intercepted his letter to his brother who was then a member of the German agitators' congress in Frankfurt am Main. Thus, our colleague has been charged as an accomplice of western rebels⁶².

Apparently, this action was initiated by the political police. On November 3, 1848, Uvarov received a letter from the Chief of the Third Section of His Imperial Majesty's Own Chancellery and Chief of Gendarmes Count Alexei Orlov insisting that it was necessary to «dismiss Hoffmann, order him to leave Russia and have him sign a written undertaking to do so»⁶³.

The passage on Greek's kinship with Russian reflects a new twist in the controversy over the pronunciation of Ancient Greek. Historically, it was the Byzantine-Modern Greek pronunciation that was used in Russia and taught at priests' seminaries and at Moscow University until the beginning of the nineteenth century. In Western Europe, a reformed pronunciation introduced by Erasmus back in the sixteenth century was used. German professors who were invited in the early nineteenth century to teach at Russian universities (especially Christian Friedrich Graefe in St. Petersburg and Ernst Maurer in Kharkov) introduced the Erasmian pronunciation there. This gave rise to resistance which, in turn, stimulated scholarly justification of the Byzantine pronunciation and emphasis on the Greek language's kinship with Old Church Slavonic.

The development of classical education including Greek that Sergei Uvarov had promoted was interrupted by the revolution in 1848. Government circles in Germany and in Russia believed that one of the causes of the revolution was classical education that had a bad influence on the youth and spread democratic ideas. The decision was taken to reduce the teaching of Greek to universities and a few secondary schools. In 1852, Platon Shirinskii-Shikhmatov who superseded Uvarov as minister of education had the Erasmian pronunciation prohibited at higher and secondary educational institutions, returning to the Reuchlinian pronunciation that was in use at Russian Orthodox theological academies and seminaries⁶⁴. Avraam Norov, Shirinskii-Shikhmatov's successor as minister of education, continued this policy.

⁶² Buslaev, *Moi vospominaniia*, cit.

⁶³ RGIA, f. 733, inv. 34, file 10, fol. 1.

⁶⁴ I.M. Tronskii, *Iz istorii klassicheskoi filologii v Rossii. Spory o shkol'nom proiznoshenii drevnegrecheskogo iazyka* [From the history of classical philology in Russia. The debate about

In Kazan, fulfilling Minister Norov's wish for a «Russian» to teach Greek was difficult for lack of an appropriate teacher. Since the late 1840s, the young and talented Kleotild Tchorzewski seemed a worthy successor to Vater, but he died in March 1854⁶⁵. The only contender for the chair of Greek literature and antiquities was Vater's former pupil Alkuin Scharbe, who was German. However, his case became a compelling evidence that being awarded a degree and having one's competence acknowledged as sufficient for a doctorate did not necessarily mean that one would then automatically qualify for professorship. Involved in the years-long discussion were professors of the Department of History and Philology and other faculties. Professors were discussing the intricacies of scholarly works and differences between the standards applicable for historical and philological research, while masters were lecturing to students. In the end, the "opposition of opinions" led to the contender's application being rejected and the competition for the chair reopened. The new competition ended in November 1858 with Alkuin Scharbe's brother Raimund getting the chair (albeit not for long)⁶⁶.

Summing up, the appointment of the young German philologist Friedrich Vater to the chair of Greek literature and antiquities in Kazan led to a flourishing of classical philology at Kazan University in the 1840s and early 1850s. While at other universities of the Russian Empire antiquity studies mostly benefitted from Russian scholars returning home after training abroad, in Kazan European models of teaching and learning classical philology were implemented by visiting German professors.

There were three channels through which this transfer of western models took place, our study of Professor Vater's activity shows. Firstly, at the meetings of the University Council Vater was seeking to defend the integrity and the contents of his courses, persuading his colleagues that classical philology should be an independent discipline among other ones taught at the faculty. Secondly, Vater conveyed his own understanding of philology and its methods to students through a special philological seminar as well as through lectures. After participating in Vater's seminar, philologists may have not become experts in Ancient Greek literature, but they were able (as Bulich, for example) to evaluate studies in ancient philology and to express and substantiate their point of view.

Thirdly, the transfer of European scholarly criteria and standards took place via Vater's reviews of doctoral and masters' theses of young scholars, his pupils and (or) younger colleagues. He was one of the first in the Faculty of

school pronunciation of the Greek language], in *Dvoinoi portret IV. Konstanty russkoi kul'tury: Klassicheskii grecheskii iazyk i ellinskii mir. Ellinisty: Iazykovedy i pedagogi* [Double portrait IV. The constants of Russian culture: Classical Greek and Hellenistic world. The Hellenists: Linguists and educators], Moscow, Filomatis, 2014, pp. 119-125.

⁶⁵ *Biograficheskii slovar' professorov i prepodavatelei Imperatorskogo Kazanskogo universiteta (1804-1904)*, cit., p. 179.

⁶⁶ NA RT, f. 977, inv. Sovet, file 3738, fol. 23-160.

Philosophy to write such reviews and articulate the criteria of scholarly quality and academic ethics. When evaluating research works, Vater paid attention to their relevance, novelty and usefulness, the completeness of source material and literature and the critical analysis thereof, the research methods and the academic writing style. In addition, it was one of Vater's rules to show respect for alternative viewpoints. His talks in the meetings of Department of History and Philology, his discussion of reviews and improving their formulations, followed by drafting written versions that contained detailed analysis and arguments could not fail to affect his colleagues' look and help focus it. In this case, Vater's reviews functioned not just as evaluation tools but also as education ones.

«La falange di Cristo». Preti e laici impegnati tra difesa e valorizzazione della scuola cattolica e lotta al comunismo

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«The phalanx of Christ». Priests and laity engaged in defending and enhancing the Catholic school and in fighting against communism

ABSTRACT: This article discusses a collection of archival sources that I studied while conducting research on issues of Catholic culture after World War II. This work leads to understanding the experience of a priest, Aleramo Rastelli, who characterized an era: that of the Cold War. Through his activity it is possible to reconstruct both a picture of the mentality used by a large sectors of the Catholic culture in the world of education both the commitment of many Catholics in politics.

EET/TEE KEYWORDS: History of School; Catholicism; Communism; Cold War; Italy; XXth Century.

Introduzione

Tutto è iniziato da un ritrovamento casuale di documenti¹ appartenuti a don Aleramo Rastelli (1916-1977), sacerdote fermano impegnato tra difesa e valorizzazione della scuola cattolica e lotta al comunismo². Lo studio di questo fondo è stato un punto di partenza per arrivare alla conoscenza di molti altri documenti inediti, contenuti in archivi ancora in via di sistemazione³, e all'analisi di una vasta storiografia per comprendere meglio una serie di

¹ Si veda: Fondo Storico Don Aleramo Rastelli (FSDAR), Biblioteca Civica «Romolo Spezioli» di Fermo.

² Cfr. L. Leoni, *Preti e politica nel Novecento. Il caso di don Aleramo Rastelli*, Ancona, Affinità Elettive, 2011.

³ Si vedano: Archivio Personale di Luigi Gedda (APLG) della Fondazione Vittorino Colombo di Milano, depositato presso l'Archivio Storico del Comune di Lodi e il già ordinato Archivio Informatico dei Comitati civici (ACC) dell'Istituto di Studi Politici «S. Pio V» di Roma.

intrecci, tra episodi locali e eventi generali, tra storia della cattolicità italiana e avvenimenti politici e sociali nazionali e europei, fondamentali per capire e contestualizzare la vicenda emblematica di Rastelli, che può essere considerata come un modello che ha caratterizzato il periodo dal secondo dopoguerra alla fine degli anni Settanta.

Rastelli, infatti, dal 1946 al 1975 ricoprì contemporaneamente più incarichi: insegnante presso l'Istituto Magistrale «Bambin Gesù» di Fermo, di cui dal 1951 divenne preside, rettore del Collegio arcivescovile Fontevicchia, sempre di Fermo, vicepresidente regionale per le Marche della Federazione Istituti Dipendenti dall'Autorità Ecclesiastica (FIDAE), direttore e capo redattore poi della rivista dell'archidiocesi di Fermo «La Voce delle Marche», non ultimo consulente ecclesiastico del Comitato civico zonale (CCZ) di Fermo, associazione in cui fu molto attivo, sia per la conoscenza personale con Luigi Gedda (1902-2000), fondatore e presidente del Comitato civico nazionale (CCN), sia per le diverse funzioni che vi svolse, partecipando anche come docente ai corsi di formazione per gli attivisti tenuti a Casale Corte Cerro, località situata in provincia di Verbania, in Piemonte. Rastelli si distinse per aver integrato i vari ruoli in un'azione unitaria educativa e politica. I luoghi ove operava come insegnante, spesso erano gli stessi di quelli dove organizzava le battaglie politiche e formava gli attivisti cattolici. Dato il personaggio in questione, quindi, e le vicende a cui è collegato, si comprende la varietà dei documenti contenuti nel Fondo, non ancora completamente studiati, soprattutto quelli che concernono le riviste internazionali a cui il sacerdote era abbonato.

Pertanto risulta difficoltoso scrivere un articolo tenendo conto di tutta una attività molto articolata e impegnata su più fronti. Inoltre, risulta anche complicato contestualizzare «l'esperienza Rastelli» in una cattolicità che a partire dalla fine degli anni Cinquanta ha subito un'evoluzione progressivamente accelerata. Occorre poi, per comprendere sia le ragioni delle posizioni assunte dai cattolici sia il loro successo o fallimento, inquadrarle nel panorama politico-sociale dell'Italia e dell'Europa durante gli anni della guerra fredda. Di conseguenza il lavoro risulta diviso in due parti, una dedicata all'attività nel campo dell'educazione e l'altra in quello politico. Se dal punto di vista della scuola risulta più semplice contestualizzare il lavoro svolto dal sacerdote fermano, poiché esistono molti studi di storia dell'educazione che trattano le diverse associazioni cattoliche impegnate, la vicenda dei Comitati civici (CC) offre ampi spazi di ricerca. I Comitati, infatti, sono stati studiati principalmente in relazione alla loro fondazione e all'attività svolta in occasione delle elezioni politiche del 1948. Successivamente, nel corso degli anni, dalla storiografia sono stati menzionati o *en passant* o per interessi di parte sia ideologici sia religiosi. Invece sulla persona del loro fondatore, Luigi Gedda, esistono diverse pubblicazioni. Manca quindi finora una visione di insieme circa il loro modello

teologico-politico e il loro funzionamento, cioè, una ricostruzione inserita nella Chiesa e società del periodo⁴.

Inizialmente si costituirono come risposta politica dell'istituzione ecclesiastica al «pericolo rosso» che si era venuto profilando nel panorama europeo, subito dopo la fine del secondo conflitto mondiale ad opera dell'espansione sovietica. Poi, nei decenni successivi, pur rimanendo il socialcomunismo il nemico principale, avvertirono la necessità di lottare contro ogni forma di laicismo, inteso sia come ideologia vicina ai partiti sia a livello di coscienze individuali dei nuovi abitanti della società inurbata e industrializzata. La loro fine, più che per sconfitte ideologico-politiche (al di là del referendum sul divorzio), fu segnata in particolare da due eventi: il processo di secolarizzazione e il Concilio Vaticano II che, di fatto, sancì la pluralità delle posizioni dei cattolici, sia all'interno della stessa gerarchia ecclesiastica sia dei laici impegnati in politica. Si posero così le basi anche per il superamento del partito unico dei cattolici, già fortemente indebolito, tra l'altro, dalla questione morale.

Lo studio dei documenti dei comitati, soprattutto di quelli più a carattere filosofico-ideologico, mostra come la matrice delle loro tesi sia rintracciabile nei modelli teologico-politici sette-ottocenteschi elaborati da de Maistre, de Bonald e Donoso Cortés, acerrimi nemici del protestantesimo⁵. Lo stesso Gedda, analizzando le conseguenze della Riforma sia sul piano religioso sia su quello sociale, pur senza menzionare la parola secolarizzazione, considerava il comunismo come scaturito dal processo di divisione all'interno del cristianesimo, innescato da Lutero. Tuttavia, il «germe» vero e proprio dei CC, come lo definì Giovanni Spadolini, stava nell'impegno dei cattolici nei periodi risorgimentale e postunitario quando, con la fine dello Stato pontificio, gli spazi che la Chiesa come istituzione occupava nella società furono fortemente ridimensionati. L'Opera dei Congressi⁶ pertanto costituì la risposta clerico-laica⁷ alla negazione

⁴ Questo sarà l'obiettivo di una prossima pubblicazione monografica dal titolo *La falange di Cristo. Storia dei Comitati Civici*.

⁵ Cfr. G. Miccoli, *Fra mito della cristianità e secolarizzazione. Studi sul rapporto chiesa-società nell'età contemporanea*, Marietti, Casale Monferrato 1985, pp. 26-42; J. De Maistre, *Considerazioni sulla Francia*, a cura di M. Boffa, Roma, Editori Riuniti, 1985, p. 23; M. Tagliaferri, *L'Unità Cattolica. Studio di una mentalità*, Roma, Pontificia Università Gregoriana, 1993.

⁶ L'Opera dei Congressi aveva la finalità di riunire i cattolici in una concorde azione per difendere i diritti del mondo cattolico. Venivano trattate tante questioni politico-economiche e una delle tematiche più sentite era quella scolastico-educativa. Infatti a cominciare dalla legge Casati (del 1859), che lasciava una funzione essenziale ai comuni nella conduzione delle scuole, di conseguenza si impedì lo sviluppo del sistema educativo soprattutto nei piccoli centri a causa della carenza di disponibilità di fondi. La Chiesa, pertanto, attraverso la scuole cattoliche, svolgeva un reale servizio grazie alla sua struttura che poteva sopperire anche alle necessità amministrative delle stesse. Cfr. L. Pazzaglia, *Educazione e scuola nel programma dell'Opera dei Congressi (1874-1904)*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 87-126.

⁷ Nell'Opera dei Congressi, non era solo presente il germe dei Comitati civici, ma anche quello dell'Azione Cattolica, del movimento modernista, dei cattolici progressisti e di sinistra. Nell'ultimo

da parte dello Stato liberale dei diritti inviolabili dei cattolici. La nuova struttura dell'Opera, come delineata nel Congresso di Pavia del settembre 1894, era organizzata in diverse "sezioni", una delle quali, la terza, era spiccatamente politica. Al riguardo Spadolini scriveva:

[la terza sezione] spostava il suo obiettivo dalla mistica alla dedizione militante, all'azione quotidiana e combattiva per difendere l'educazione religiosa nei comuni e nelle provincie e in genere per assicurare la salvaguardia degli interessi connessi al patrimonio o all'operosità ecclesiastica⁸.

Queste necessità erano molto sentite all'interno del movimento cattolico, infatti già al Congresso di Genova nell'ottobre del 1892, era stata formulata la richiesta della creazione «in tutti i centri» di appositi «comitati elettorali».

Nel corso dell'Ottocento e nella prima metà del Novecento quindi il *modus operandi* dei cattolici si era modificato in relazione ai mutamenti di carattere politico. A preoccupare era l'allargamento della base elettorale e quindi il graduale affermarsi dei partiti di massa soprattutto quelli portatori di ideologie laiciste e materialiste. I cattolici così si videro costretti a rispondere a tale sfida.

I Comitati Civici: Chiesa e secolarizzazione in Italia nel secondo Novecento

La gerarchia ecclesiastica era seriamente preoccupata di un successo di misura o addirittura di una vera e propria sconfitta della Democrazia Cristiana (DC) nelle prime elezioni dell'era repubblicana. Da un lato la gerarchia era contraria ad una nuova alleanza governativa tra DC, Partito Socialista Italiano (PSI) e Partito Comunista Italiano (PCI), dall'altro, se i socialcomunisti avessero vinto, l'Italia, dopo la fase storica della dittatura fascista, sarebbe entrata nell'orbita dell'Unione Sovietica, il che, a loro giudizio, significava: dittatura comunista. Pertanto, pur essendoci diversi indirizzi di pensiero all'interno dell'associazionismo e anche all'interno del partito cattolico, alla vigilia delle elezioni politiche del 1948, dalla stretta collaborazione tra Pio XII e Luigi Gedda, nacquero i CC.

Essi costituiscono un vero e proprio braccio secolare-politico della gerarchia ecclesiastica, una grande *intelligence*, un crogiolo di consacrati e laici⁹, uniti per

decennio del XIX secolo, infatti, con la questione sociale e l'affermazione del socialismo, i cattolici si divisero su tesi e modi di azione differenti, tanto che, tra il 1891 e il 1900, l'Opera andrà sempre più spaccandosi fino alla scomparsa cfr. Pazzaglia, *Educazione e scuola*, cit.

⁸ G. Spadolini (1954) *L'Opposizione cattolica. Da Porta Pia al '98*, Firenze, Vallecchi, 1966, p. 301.

⁹ Già nel simbolo veniva rappresentata l'unione tra laici e chiesa: una stretta di mano, sullo sfondo due torri, la prima un campanile a rappresentare la chiesa, la seconda una torre civica dei comuni o degli orologi comunali.

la difesa della Chiesa e della società cristiana. La loro ramificazione territoriale rispecchiava quella del mondo ecclesiastico. Va evidenziato inoltre come la strutturazione interna del movimento con l'Ufficio quadri, l'Ufficio psicologico e l'Ufficio attivisti era ideata proprio per essere contrapposta all'organizzatissimo complesso di elementi del PCI. Poiché vigeva ancora il Concordato che impediva un impegno diretto dell'Azione Cattolica (AC), i Comitati rappresentarono l'organizzazione politica di tutte le associazioni cattoliche in modo che le norme fossero, almeno sulla carta, rispettate. La realtà infatti era che spesso i dirigenti dei Comitati ricoprivano contemporaneamente incarichi di vertice nelle altre associazioni. In sostanza come l'Opera dei Congressi nella seconda metà dell'Ottocento doveva coordinare l'impegno dei cattolici in politica e più in generale nella società, così il Comitato civico doveva fare altrettanto in questo nuovo scenario. Poi vi era la «falange» di attivisti, ben formati sia dal punto di vista ideologico-religioso sia su quello organizzativo-propagandistico. La loro selezione era fatta su tutto il territorio nazionale e quelli che venivano scelti, erano schedati dal CCN e dovevano essere accompagnati da lettere di presentazione dei parroci delle rispettive parrocchie. Vi erano soglie minime e massime per il reclutamento dei giovani: venivano selezionati coloro che avevano un'età non inferiore ai 19 e non superiore ai 25 anni. Inoltre le spese di viaggio e di soggiorno degli «studenti» per il periodo di formazione al Getsemani di Casale Corte Cerro erano «a carico dell'Organizzazione»¹⁰.

Ogni Comitato, a cominciare dal CCN, al CCZ fino al Comitato Civico Locale (CCL), aveva un consulente ecclesiastico che collaborava e che faceva da tramite tra il vescovo e il rispettivo Comitato. In alcune zone però, dove i Civici non riuscivano a costituirsi in circoli, era il parroco che portava avanti, su direzione del vescovo e di attivisti nazionali, le attività di propaganda. In genere i Comitati venivano costituiti per la campagna elettorale. In prossimità dell'attività elettorale il CCN spediva le missive di ricostituzione dei CCL insieme al materiale propagandistico come manifesti, volantini e giornali murali, in parte già stampato e in parte da stampare nelle varie località per la battaglia. Comunque i responsabili, come i vari consulenti ecclesiastici, lavoravano continuamente. Anche l'attività di formazione degli attivisti nazionali fu quasi sempre ininterrotta. I Comitati svolsero una lotta politica spicciola e capillare, attraverso soprattutto i manifesti la loro propaganda era incentrata sull'antiastensionismo, l'antimarxismo e il voto cristiano.

Lo spirito che animava il movimento era fornito da Gedda con la sua interpretazione dell'episodio evangelico del Getsemani. Lo stesso presidente del CCN fornì la spiegazione in un numero, del 1978, di «Tabor» la rivista ufficiale della Società operaia che aveva fondato nel 1942 a Roma. Il termine Getsemani, in aramaico significa «frantoio delle olive» e denominava una località situata

¹⁰ Cfr. Lettera di P. L. Migliaccio al Presidente del CCZ di Lodi, due fogli dattiloscritti, datati 3 ottobre 1963, Fondo Francesco Ferrari (FFF), Archivio Storico del Comune di Lodi, Busta 5.

ai piedi del Monte degli Ulivi. Il Getsemani, a suo giudizio, rappresentava l'episodio «di angoscia, di conforto e di superamento del dolore che l'uomo affronta nella sua vita»¹¹. Il dettato da seguire per ogni cattolico pertanto era contenuto nelle parole che Gesù pronunciò nell'orto degli ulivi rivolgendosi agli apostoli: «vegliate e pregate»¹². Gedda sosteneva che i laici cattolici dovevano vegliare, quindi stare attenti ai pericoli che la società presentava, e pregare. Ciò significava unire all'adorazione l'azione concreta in campo politico, economico e sociale. Non vi poteva essere alcuna «mediazione politica» tra l'adorazione e l'azione, ma le due fasi dovevano costituire un *continuum*. Dai resoconti delle relazioni tenute ai futuri attivisti nel «quartier generale», il Getsemani di Casale Corte Cerro, si comprende quale spiegazione Gedda forniva ai giovani riguardo al programma di cui gli attivisti dovevano servirsi:

una pillola – sosteneva – ad alto potere [...] è una parola che si può scomporre in tre parole, e perciò la commentiamo separatamente, togliendo le due prime lettere dalla parola Adorazione, c'è un'altra parola: orazione, togliendo altre due lettere [azione]¹³.

Nel suo intento l'azione si basava sull'adorazione il cui significato utilizzato era simile a quello di prostrazione, «Non la Mia ma la Tua volontà sia fatta», e sulla preghiera in quanto l'attivista doveva pregare. Questa azione che poggiava su due momenti, adorazione e orazione, aveva la prerogativa di condurre a una trasformazione dell'intera società, partendo dal singolo individuo.

I corsi nel Getsemani di Casale Corte Cerro erano impostati in modo che gli attivisti si formassero compiutamente tanto dal punto di vista teologico-politico, conoscendo sia la dottrina sociale della Chiesa sia quella marxista, quanto dal punto di vista pratico-propagandistico. Vi erano: lezioni, esercitazioni e periodi di preghiera. I programmi delle giornate tipo, esempio come quelli del Corso Nazionale Attivisti «Giuseppe Patrizio Walshe», sono contenuti nell'APLG:

Programma giorno 26 – Domenica. Ore 10 – 1° Lezione: Dott. Tognon. 11.30 – 2° Lezione: Dott. Tognon. 14 – nelle proprie stanze. 15 – Riunioni di Gruppo. 16.30 – 3° Lezione: Don Francini. 18 – Ricapitolazione scritta. Giorno 27 – Lunedì. Ore 9.45 – 1° Lezione: Perico. 11.15 – 2° Lezione: Perico. 12.30 – pranzo. 14.00 – riposo. 15.30 – 3° Lezione: Perico. 17.00 – 4° Lezione: Perico. 19.30 – cena. 20.45 S. Rosario e Meditazione. 21.15 – Circolo serale¹⁴.

Alcune delle esercitazioni pratiche erano costituite dalle relazioni di gruppo su temi come: «Piano di accostamento delle nuove leve elettorali»; «Come il CCL deve organizzarsi per la sua funzionalità nel periodo di emergenza

¹¹ L. Gedda, *Andiamo al Getsemani*, «Tabor», vol. 32, nn. 7-12, 1978, APLG, Busta 192.

¹² Cfr. Mc. 14, 38: «Vegliate e pregate per non cadere in tentazione; lo spirito è pronto, ma la carne è debole».

¹³ Discorso di Gedda tenuto agli attivisti del XVII Corso Nazionale A «Fratelli Migliaccio», 13 pagine dattiloscritte, APLG, B. 153, p. 9.

¹⁴ APLG, B. 9.

elettorale»; «Il nostro atteggiamento verso i comunisti»; «Le forme più efficaci della propaganda». Inoltre gli attivisti venivano sottoposti a dei veri e propri test individuali in classe:

Esercitazione. Giorno 28: ore 21.40 – consegnato alle ore 22.15. 1 Se al momento in cui il proletario va al potere la dialettica della storia viene a cessare, come possiamo spiegarci ancora in Russia dei superamenti di governo? 2 Non è forse una incoerenza con il sistema marxista il dare maggiore salario ad artisti e stakanovisti? Quale merito hanno essi in più nei confronti degli altri? 3 In che modo Marx fa dipendere la religione, la filosofia e l'arte dal momento economico che le determina? 4 Fino a che limite non dobbiamo accettare il dialogo propostoci dai comunisti?¹⁵

Venivano spesso pubblicati anche sulla rivista ufficiale del movimento, «Collegamento», i programmi e le fotocronache dei corsi svolti, come ad esempio quelli concernenti il ben strutturato XXXIX corso intitolato a «Eugenio Pacelli». Il programma assomigliava ad un vero e proprio corso universitario:

P. Lucio: Storia della Chiesa; L'organizzazione dei laici nella Chiesa. Severino Tognon: Crisi del mondo moderno; Il laicismo. Alceo Aureli: Organizzazione del Comitato Civico – L'U.N.A.C.; Tecnica dei principali strumenti della propaganda. Prof. Giampietro Dore: Dal Partito Popolare Italiano alla DC; L'attuale schieramento dei partiti in Italia. P. Angelo Macchi: Il comunismo: dottrina, organizzazione e metodologia. Dr. Vitaliano Rovigatti: I problemi del sindacalismo democratico e le strutture sindacali italiane; Assistenza e Previdenza sociale. Prof. Gabrio Lombardi: I problemi ideologici, giuridici ed istituzionali dello Stato moderno; Stato e Chiesa. On. Pierantonio Bertè: Libertà e giustizia nella concezione liberale, marxista e cristiana; Economia e sociologia liberale; Origine del proletariato e rivoluzione industriale; Economia politica. P. Giacomo Perico: La dottrina sociale cristiana. Ing. Ugo Sciascia: Coscienza del nostro impegno; Linee dinamiche della politica mondiale e nazionale; Rilancio dei Comitati Civici; Vincere il comunismo. Vittorio Bellucci: L'Azione Cattolica; Forme moderne di apostolato. Dr. Mario Cuniberto: Storia politica del Medio Oriente; La Chiesa del Silenzio in Europa¹⁶.

Altro strumento utilizzato per la formazione e propaganda continue, se così si può definire, era l'opuscolo: ve ne sono rimasti moltissimi nel FSDAR. Gli opuscoli venivano distribuiti sia a livello nazionale sia a livello locale dai vari dirigenti locali, come ad esempio quelli scritti e stampati dal sacerdote fermano. Anche i corsi venivano, oltre che a livello centrale, organizzati nelle varie regioni¹⁷. Don Rastelli stesso convocava al Fontevicchia gli attivisti che dovevano perfezionare l'azione propagandistica attraverso lo studio della stampa avversaria. Il «nemico» andava conosciuto a fondo e sconfitto nel suo stesso campo di battaglia dimostrando la falsità e la non validità della sua proposta politica.

¹⁵ *Ibid.*

¹⁶ Cfr. «Collegamento dei Comitati Civici», vol. X, n. 12, 1958, p. 2.

¹⁷ Ciò è vero non solo a livello marchigiano, ma anche per le altre regione come si può notare dai documenti presenti nell'APLG.

Vi era una fitta rete di attivisti sparsi sull'intero territorio nazionale¹⁸ che con l'andar del tempo però si smagliò, poiché sia all'interno della società sia all'interno della Chiesa la situazione stava mutando rapidamente e se questo tipo di lotta poteva produrre grandi risultati nel 1948 e nel corso degli anni Cinquanta, faceva sicuramente meno presa in una società in forte via di secolarizzazione come si presentava quella italiana a cominciare dagli anni Sessanta in poi.

Inoltre i cambiamenti all'interno dello scenario cattolico condussero al superamento del modello geddiano sintomatico di tutta un'epoca in cui, come scriveva Pietro Scoppola,

tutti i settori della vita associata sono raggiunti da organizzazioni che da un lato, attraverso una rigida struttura verticale, fanno capo ad un forte coordinamento centrale, cui presiede il Papa stesso, dall'altro raggiungono capillarmente la base della società italiana. [Questo è il] modello organizzativo di massa di cui Luigi Gedda è il massimo esponente, derivato in larga misura dai modelli organizzativi del fascismo¹⁹.

Nel periodo postconciliare, però, i Comitati persero il loro significato politico complessivo nel mondo cattolico, in quanto, a livello teorico, era stato superato il concetto dell'unità dei cattolici in politica. Il pluralismo era infatti stato affermato ufficialmente nella *Gaudium et spes*. Mediante questo documento, come affermava Scoppola,

si passò da una impostazione dottrinale, legata alla tradizione della dottrina sociale cristiana, ad una impostazione nuova fondata sulla lettura della realtà: i 'segni dei tempi' sono la formula e l'elemento chiave per una corretta lettura della costituzione conciliare²⁰.

Lo sviluppo del pluralismo ideologico non era frutto tanto di una necessità morale individuale, cioè che ogni cattolico dovesse ragionare e prendere posizioni in base alla propria coscienza, quanto anche a nuovi concetti sviluppati dal Concilio come quelli esposti nella *Lumen Gentium* e facenti riferimento al fatto che la Chiesa era prima di tutto «popolo di Dio» guidato da carismi dello Spirito. I laici, a cui la Costituzione riserva il quarto capitolo, a tutti gli effetti contribuiscono allo sviluppo della Chiesa stessa prendendo decisioni anche autonome dalla gerarchia²¹. Da questa nuova concezione nacque anche una nuova impostazione della stessa storiografia della chiesa, più diversificata, legata alle tante esperienze. A giudizio degli esponenti più aperti, come D. Chenu, non si poteva più desumere un criterio unico di interpretazione dei fatti

¹⁸ Nel 1960 si contavano ben 343 attivisti nazionali; cfr. APLG, B. 18.

¹⁹ P. Scoppola, *Il progetto degli anni '30 fra realizzazioni e contraddizioni nel secondo dopoguerra*, in *L'idea di un progetto storico. Dagli anni '30 agli anni '80*, Roma, Studium, 1982, p. 87.

²⁰ P. Scoppola, *Evoluzione del quadro storico*, in *La costituzione conciliare Gaudium et spes vent'anni dopo*, Atti del seminario di studio, Abbazia di Praglia, Roma, Gregoriana, 1988, p. 21.

²¹ Cfr. *La Chiesa del Vaticano II. Studi e commenti intorno alla Costituzione dogmatica «Lumen Gentium»*. Opera collettiva diretta da Guilherm Baraúnao f.m., Firenze, Vallecchi, 1965.

storici basato sulla fede. Ma lo storico della Chiesa doveva conservare una propria autonomia di spiegazione. Pertanto la pluralità si basava proprio sulla validità delle differenti ricostruzioni storiche del cristianesimo.

Il più grande limite di Gedda, del resto, come di tutta l'ala neotradizionalista novecentesca, derivava dalla sua impostazione filosofica, basata in un certo qual modo ancora sulla scolastica medievale, che lo condusse all'incapacità di comprendere appieno o quanto meno confrontarsi con la modernità. I Comitati non furono capaci di elaborare un loro nuovo linguaggio adatto per quegli anni. Non riuscirono a capire che la causa principale della secolarizzazione e anche scristianizzazione della società non era tanto il comunismo di stampo marxista e materialista, quanto lo sviluppo economico (poi sempre più materialista-consumista) che i Comitati invece andavano sbandierando proprio in funzione anticomunista²². Come afferma Pietro Scoppola per la cattolicità il vero nemico arrivò alle spalle²³. Come scrive anche Marzano: «mentre il mondo cattolico italiano era impegnato a combattere con tutte le sue energie il nemico comunista, il pericolo vero, il più insidioso, il più temibile, arrivava alle spalle, e prendeva le forme di una società industrializzata, urbanizzata e secolarizzata, nella quale il messaggio della Chiesa sembrava non trovare ascolto»²⁴. Il progresso stava cambiando nel profondo la vita delle nuove generazioni e questo lo conduceva a costruire una nuova identità diversa da quella di provenienza²⁵.

La libertà della scuola: lo Stato educatore contro il diritto naturale

Uno dei settori dove lo scontro era particolarmente sentito tra le diverse associazioni cattoliche come quella dei Comitati insieme ad altre di settore come la FIDAE²⁶ e i partiti laici riguardava la scuola. D'altra parte il fronte laico che mirava a un ridimensionamento della presenza della scuola cattolica andava al di là delle tradizionali posizioni politiche; erano d'accordo in tal senso sia i partiti socialcomunisti sia i repubblicani, i liberali e una parte del Movimento Sociale Italiano (MSI).

²² Va ricordato comunque che molti anche all'interno dei Comitati erano contrari al capitalismo sfrenato e cercavano una soluzione di compromesso e che don Rastelli era uno di questi.

²³ Cfr. P. Scoppola, *La «nuova cristianità» perduta*, Roma, Studium, 1986 (1985).

²⁴ M. Marzano, *Il cattolico e il suo doppio. Organizzazioni religiose e Democrazia Cristiana nell'Italia del dopoguerra*, Milano, FrancoAngeli, 1996, p. 160.

²⁵ Cfr. E. Scarpellini, *L'Italia dei consumi. Dalla Belle époque al nuovo millennio*, Roma-Bari, Laterza, 2008, pp. 175 ss.

²⁶ Alla nascita, nel 1945, la FIDAE raggruppava un alto numero di scuole medie, inferiori e superiori, e delle materne. Lo scopo della nascita era la necessità di un intervento da parte della Chiesa per un coerente programma educativo. Cfr. R. Sani, «*La Civiltà Cattolica*» e il problema della scuola nel secondo Novecento (1945-1965), in Pazzaglia, Sani (edd.), *Scuola e società*, cit., pp. 357-358.

L'aspetto che stava più a cuore alla FIDAE fin dalla Costituente era quello economico basato sull'interpretazione dell'articolo 33 della Costituzione²⁷. Infatti, se lo Stato non avesse garantito i finanziamenti necessari alle scuole cattoliche, esse avrebbero avuto serie difficoltà a sopravvivere. Inoltre lo Stato, negando i contributi economici, non garantiva alle famiglie la libertà di poter scegliere la scuola migliore per i propri figli. Quindi dall'articolo 33, aspetto economico, attraverso l'interpretazione di altri articoli, la lotta passava anche sul piano ideologico si sarebbe dovuta garantire in sostanza la continuità del processo educativo tra famiglia e scuola²⁸.

La tesi esposta più volte nel corso degli anni Cinquanta dal sacerdote fermano sulla libertà della scuola cattolica concerneva la possibile coesistenza della medesima in uno stesso quartiere con quella di Stato. Il *leitmotiv* era che la concorrenza tra le due istituzioni avrebbe favorito per entrambe la qualità dell'insegnamento. Rastelli, per avvalorare questa tesi, ricordava al riguardo la posizione di Croce sostenuta nel 1921 come ministro dell'Istruzione. Croce infatti, pur essendo contrario ai finanziamenti alle scuole cattoliche, si era espresso in tal senso sostenendo che la concorrenza sicuramente avrebbe giovato sia alla scuola cattolica sia a quella di Stato²⁹.

Rastelli, in base alla sua personale esperienza di studi, conosceva molto bene i temi giuridico-educativi riguardanti la scuola. Durante gli ultimi sussulti del regime fascista condusse gli studi di giurisprudenza all'Università di Macerata, conseguendo la laurea nel 1946³⁰. In questo periodo cominciò ad affrontare il problema del valore della libertà individuale nell'educazione, e i pericoli legati ad una mentalità totalitaria, attenta alle sole componenti collettive della vita. La minaccia più grave dei vari totalitarismi era infatti quella di monopolizzare l'azione educativa nel suo complesso. Il principio ispiratore che animava quindi

²⁷ Si vedano: T. Tomasi, *La scuola italiana dalla dittatura alla Repubblica*, Roma, Editori Riuniti, 1976; L. Pazzaglia, *Il dibattito sulla scuola nei lavori dell'Assemblea Costituente*, in G. Rossini (ed.), *Democrazia Cristiana e Costituente*, Roma, Cinque Lune, 1980; Id., *Cattolici e scuola nell'Italia contemporanea*, Milano, ISU Università Cattolica, 1984; Id. (ed.), *Chiesa e progetto educativo nell'Italia del secondo dopoguerra (1945-1958)*, Brescia, La Scuola, 1988; Id., *Cattolici e scuola pubblica. Dall'Unità d'Italia ad oggi*, Brescia, La Scuola, 2015; F. Traniello, G. Campanini (edd.), *Dizionario storico del movimento cattolico in Italia*, Marietti, Casale Monferrato, 1981; R. Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra. 1944-1958*, Brescia, La Scuola, 1990; G. Chiosso, *I cattolici e la scuola dalla Costituente al centro-sinistra*, Brescia, La Scuola, 2014. Inoltre di grande importanza è l'opera: G. Chiosso, R. Sani (edd.), *Dizionario biografico dell'educazione (1800-2000)*, Milano, Bibliografica, 2013.

²⁸ Si vedano le due lettere dell'on. Renato Tozzi Condivi a Rastelli, due fogli dattiloscritti datati rispettivamente 17 e 21 settembre 1956, FSDAR, F. 12, C. 2. Vi è anche la risposta del sacerdote, un foglio dattiloscritto datato 21 settembre 1956.

²⁹ Cfr. A. Rastelli, *C'è o non c'è la libertà nella scuola? Questa benedetta scuola privata sottrazione di nulla a nessuno*, «La Voce delle Marche», vol. LIX, n. 26, 1951, p. 2.

³⁰ Esiste copia del certificato di laurea FSDAR, F. 0, ma non informazioni riguardo la dissertazione, in quanto sia nel fondo sia presso la Facoltà di Giurisprudenza non è conservata copia della tesi di laurea.

il sacerdote fermano era quello di difendere la libertà della scuola cattolica considerata come una manifestazione diretta dei principi della legge naturale. Approfondì questa tematica nel periodo in cui affrontò gli studi di filosofia prima a Roma e poi a Bologna, dove si laureò il 9 giugno 1953 con la dissertazione *La libertà della scuola nello stato moderno*³¹. La dissertazione costituì un punto fermo nell'elaborazione del suo pensiero poiché redatta dopo diversi anni di impegno nel settore educativo come insegnante, rettore e preside. Tale studio è significativo in quanto offre un quadro dei problemi su cui ampi settori della cultura cattolica riflettevano in quegli anni.

L'esposizione dei principi su cui fondare l'ordinamento delle scuole cattoliche era il tema principale della tesi. Essendo un lavoro di filosofia i temi venivano sviluppati in forma generale senza toccare argomenti specifici relativi alla didattica, come ad esempio il numero settimanale di ore di religione, le liste dei libri di testo ammessi, le possibilità di incontro tra insegnanti e genitori, feste e gite. Un secondo aspetto importante era dato dal fatto che egli, per difendere le proprie tesi, si serviva di argomentazioni filosofiche sviluppate dal personalismo, fornendo una nuova interpretazione degli articoli della Costituzione che si riferivano alla vita della scuola. Per lui infatti il valore della libertà costituiva la base su cui edificare l'interiorità della persona umana. Tale valore andava poi contestualizzato nella funzione costitutiva dei gruppi umani e della società, la quale, nella ricerca del bene comune, rimaneva ancorata ai principi della legge e del diritto naturali. Scriveva in tal senso:

Si dice che lo Stato è l'autore della vita sociale e quindi ha diritti da far valere almeno come la famiglia. Rispondo. C'è un equivoco: la vita sociale, che si esprime attraverso lo Stato, è logicamente, cronologicamente posteriore alla costituzione familiare, e non è altro, come si è spesso ripetuto, che l'ordine delle famiglie raggruppate in un territorio per tradizioni precedenti o circostanze fortuite e viventi sotto un governo da loro ratificato³².

La libertà nella scelta della scuola da parte dei genitori si doveva considerare come la continuazione dell'esercizio della libertà della famiglia che attua il proprio compito «istruitivo-educativo» secondo le modalità riconosciutegli come diritto-dovere dalla Costituzione. Per legittimare i fondamenti naturali della libertà educativa della famiglia occorreva capire, secondo Rastelli, la struttura del «soggetto a cui questo diritto si riferisce, cioè la persona umana». Poi esprimeva anche alcune considerazioni sul ruolo delle famiglie i cui figli frequentavano le scuole di Stato. Anche in questa situazione, la famiglia non poteva essere estromessa, ma autorizzata a una vigilanza efficace, perché nulla contrastasse il suo ideale educativo. Quindi, anche se le scuole erano a

³¹ Tesi di Laurea, Archivio Storico Università di Bologna, Fascicolo degli studenti di Lettere, Aleramo Rastelli, Arch. N. 7842, Posiz. N. 684.

³² *Ibid.*, p. 93.

conduzione statale, andava effettuata una funzione di controllo da parte delle famiglie, che dovevano vigilare sull'insegnamento e sulla sua moralità.

L'insegnamento e l'educazione – si leggeva – guardati anche nel loro rapporto all'interesse sociale o come formazione del cittadino futuro sono dalla natura affidati ad altri organismi, diversi dallo stato, in primo luogo alle famiglie. Se l'argomento dell'influsso sociale esercitato dall'educazione dovesse valere per affermare una nuova funzione normale dello stato in materia, esso proverebbe troppo, poiché, ridondando il bene dell'individuo, delle famiglie e della natura anche il bene dello Stato, l'autorità pubblica dovrebbe ordinare tutto da sé instaurando così sistemi totalitari. Ma lo Stato trova già persone e famiglie che in esso vivono precostituite e potrà solo dar leggi affinché concorrano al bene comune e non sostituirsi con azione normale³³.

Poi si auspicava e concludeva che il problema della parità scolastica raggiungesse una fattiva soluzione dal punto di vista legislativo. Al riguardo affermava:

Se la funzione dello Stato di fronte all'insegnamento e all'educazione della gioventù, come di fronte all'iniziativa privata, è di creare le condizioni favorevoli perché questo diritto familiare si attui e raggiunga pienamente il suo compito, dovere dello Stato è anzitutto fornire i mezzi necessari a questo scopo, non solo giuridici ma anche economici, senza i quali il diritto potrebbe venir gravemente compromesso, se non del tutto frustrato. È una logica conseguenza della funzione ausiliaria dello Stato [...]. Non c'è ragione di sospendere questi aiuti alle scuole libere con il pretesto della esistenza di quelle statali, che sorgono ad integrazione e non a sostituzione di quelle, basate sul diritto anteriore allo Stato. Si ostacolerebbe in caso contrario l'attuazione di quell'elemento sostanziale della libertà della scuola che è stato chiamato libertà di scelta. Se lo Stato riconosce la necessità di alleggerire alle famiglie le spese per l'istruzione dei figli che frequentano le scuole ufficiali, non si capisce con quale senso di giustizia possa negare le sue sovvenzioni a tutte le famiglie della nazione, qualunque scuola scelgano per l'educazione e istruzione della prole, usufruendo di un diritto originario e naturale di scelta³⁴.

Questi principi lo accompagneranno nel corso di tutta la sua attività educativo-politica.

Nel periodo dello sviluppo industriale iniziato dal secondo dopoguerra vi furono profondi mutamenti sociali che richiesero una riflessione attuata con fatica, da gran parte della cultura cattolica. Prendeva sempre più corpo una lacerazione fra i valori e le finalità dichiarate negli strumenti culturali di cui si disponeva e i processi industriali sempre più incontrollabili. Le aperture di cattolici sensibili alle novità politico-culturali di quegli anni, palesatesi nella settimana sociale di Trento a metà degli anni Cinquanta, trovarono una decisa opposizione da parte dei più intransigenti come appunto quelli della FIDAE. Anche la «Civiltà Cattolica» evidenziava la necessità della presenza di una scuola cattolica a fianco di quella pubblica, e invitava ad approfondire le

³³ *Ibid.*, p. 94.

³⁴ *Ibid.*, p. 95.

finalità e i metodi formativi delle scuole cattoliche. Le divisioni causate dalle differenti posizioni all'interno del cattolicesimo sui temi della politica e della scuola agirono durante i primi anni Cinquanta e «solo i casi più clamorosi arrivarono alla conoscenza del pubblico»³⁵, come ad esempio le dimissioni di Carlo Carretto dalla presidenza della Gioventù Italiana Azione Cattolica (GIAC) per i dissensi con Gedda (1952)³⁶.

Molti cattolici erano favorevoli alla costituzione di movimenti di opinione all'interno della Chiesa che agissero come guida ideologica per i dirigenti e parlamentari della DC. Su questa linea si mossero i movimenti cattolici impegnati nel mondo della scuola. Si veda l'atteggiamento di padre Giampietro che da una parte era critico verso i parlamentari della DC che sostenevano la politica di centrosinistra chiamandoli ironicamente «demo-statalisti»³⁷ e dall'altra intratteneva continue relazioni con quasi tutti i capigruppo DC per una elaborazione comune sui progetti di legge da presentare. Poi consigliava anche ai dirigenti della FIDAE presenti sul territorio di incontrarsi con i deputati locali in modo da discutere insieme le varie proposte.

Nella seconda metà degli anni Cinquanta però il rapporto fra le componenti culturali del partito e l'area cattolica divenne più complesso. La DC acquisì una maggiore autonomia e si svincolò dalla diretta dipendenza delle organizzazioni cattoliche. L'ufficio delle attività culturali della DC fondò delle case editrici e riviste che ebbero notevole importanza nel dibattito sull'orientamento culturale da seguire.

Come esempio dell'autonomia raggiunta dalla DC rispetto alle associazioni cattoliche si cita un documento pubblicato dall'Istituto Cattolico per l'Educazione (ICE)³⁸, fortemente critico riguardo al progetto di legge relativo al piano decennale, la cui formulazione fu approvata nel settembre del 1958 dal governo Fanfani. Il documento metteva in luce come gli emendamenti successivi al progetto di legge iniziale avessero ridimensionato ulteriormente i finanziamenti destinati alla scuola cattolica. Mediante lo stanziamento di una somma aggiuntiva, il piano intendeva assicurare la copertura per spese

³⁵ G. Miccoli, *La Chiesa di Pio XII nella società italiana del dopoguerra*, in *Storia dell'Italia repubblicana*, vol. I, *La costruzione della democrazia. Dalla caduta del fascismo agli anni cinquanta*, Torino, Giulio Einaudi Editore, 1994, p. 587.

³⁶ Cfr. *Religione e politica. Il caso italiano*, Roma, Coines, 1976; A. Riccardi, *Il "partito romano". Politica italiana, Chiesa cattolica e Curia romana da Pio XII a Paolo VI*, Brescia, Morcelliana, 2007 (1983); E. Guerriero (ed.), *La Chiesa in Italia dall'unità ai nostri giorni*, Milano, San Paolo, 1996; E. Preziosi (ed.), *Storia dell'Azione Cattolica. La presenza nella Chiesa e nella società italiana*, Rubbettino, Soveria Menelli, 2008.

³⁷ Cfr. G. Giampietro, *Scuola cattolica: scuola qualificata*, «Problemi educativi. Rivista mensile dell'Istituto Cattolico per l'Educazione», vol. XVI, n. 2, 1964, p. 1.

³⁸ Documento, *I cattolici e il piano decennale della scuola*, dell'Istituto Cattolico per l'Educazione, 4 fogli dattiloscritti, firmati da diversi rappresentanti delle associazioni cattoliche, FSDAR, F. 0.

di edilizia scolastica, borse di studio, attrezzature di materiale didattico³⁹. Nel documento, i problemi della scuola trattati riguardavano sia quelli economici sia quelli specificatamente formativi. Qualche mese prima che entrasse in vigore, con il nuovo anno scolastico, la legislazione sulla scuola media unica, vennero distribuiti dall'ICE dei volantini⁴⁰ ai genitori dei ragazzi che frequentavano le scuole private per aggiornarli sulla nuova legislazione scolastica.

Nel maggio-giugno 1961 il sacerdote fermano pubblicò sulla rivista della diocesi inoltre un articolo a puntate intitolato *Sul fronte della libertà della scuola*⁴¹, poi stampato come opuscolo a scopo propagandistico⁴². In esso evidenziava come

tutta l'opinione pubblica italiana, attraverso organi di stampa, convegni culturali, organizzazioni varie, si sia interessata al dibattito sul problema del finanziamento delle scuole non statali da parte dello Stato; si parte dalla Costituzione, ma per arrivare puntualmente al vero problema di fondo, squisitamente educativo, della laicità o meno della scuola italiana⁴³.

Don Rastelli si riferiva alla generale attenzione che si era ridestata per l'articolo 33 della Costituzione, in particolare del quarto comma denominato emendamento Corbino, dal nome di colui che lo aveva presentato alla Costituente su consiglio di Croce e che fu approvato per qualche decina di voti. Con esso si stabiliva la possibilità per lo Stato di dare finanziamenti alle scuole private (cattoliche) purché senza oneri aggiuntivi. L'intento dell'opuscolo era di mostrare l'impossibilità di un accordo governativo con le forze marxiste-laiciste, a causa del loro forte impegno militante contro la religione e la Chiesa, attuato in particolare anche nella discussione del Piano decennale della scuola⁴⁴. Per dare valore alle sue tesi faceva un'attenta analisi della stampa di sinistra, riportando ampie citazioni. I socialcomunisti, esplicitava Rastelli,

³⁹ Nel F. 12, C. 1, del FSDAR, è conservato il volume di Tommaso Martella (Marco Papirio), *Il paino per la scuola. Raccontato da un giornalista*, Milano, Mondadori, [1960]. Nel volume vi era il resoconto degli avvenimenti svolti all'interno del Senato che accompagnarono la discussione del piano nei due mesi dall'ottobre al dicembre del '59. Il giornalista poneva in evidenza la complessità della discussione che investiva l'interpretazione della funzione dello Stato nella società, molte le accuse reciproche durante i lunghi interventi come ad esempio quelle dei comunisti che accusavano i democristiani di «costruire edifici da cedere sotto banco gratuitamente ad istituti confessionali, mantenendo gli oneri della proprietà a carico del cedente [lo Stato]» (p. 11). Nella conclusione si riconosceva che «il piano della scuola è essenzialmente il piano della scuola statale», ma si evidenziava come lo Stato democratico, per non degenerare verso forme autoritarie, doveva rinunciare al monopolio e sollecitare una collaborazione con le scuole private.

⁴⁰ Nel FSDAR ne sono conservati molti e di diverse tipologie.

⁴¹ Cfr. A. Rastelli, *Sul fronte della libertà della scuola*, «La Voce delle Marche», vol. LXX, n. 24, 1961, p. 2.

⁴² Id., *Sul fronte della libertà della scuola l'ateismo combatte la religione. Documentazione*, Fermo, Tip. Artigianelli, 1961, FSDAR, F. 12, C. 3.

⁴³ *Ibid.*, p. 3.

⁴⁴ Cfr. S. Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, Perugia, Morlacchi, 2000, pp. 51-74.

consideravano la religione uno strumento di oppressione che il capitalismo aveva utilizzato per mantenere la divisione di classe. Inoltre i socialcomunisti sbandieravano apertamente che «l'educazione religiosa, cattolica fosse causa di alienazione, almeno per quanto riguarda i tecnici». Per don Rastelli, quindi,

la riforma della scuola quale la esigono i socialisti, è per una società socialista, deve fungere come rampa di lancio verso quel tipo di scuola e di società, in cui sarà dato respirare *solo* il marxismo; [...] in questo sono pienamente d'accordo [...] con i comunisti [...]. La lotta dunque dei socialcomunisti per la scuola è scopertamente settaria e rivolta all'obiettivo finale di una scuola di una società tipicamente marxista, che tutti conosciamo come atea ed essenzialmente chiusa, spietatamente antidemocratica, a senso unico senza possibilità di opposizione. E costoro si permettono sfacciatamente di accusare di chiusura, di antidemocraticità la scuola cattolica e la scuola italiana in genere! Il gioco è chiaro: provocare la lenta agonia delle scuole libere, specialmente gestite dalla Chiesa, riducendole in condizione economiche insostenibili, portare tutte le scuole nelle mani dello Stato; così l'eventuale potere marxista in Italia non dovrà nemmeno sopportare i fastidi di quella violenta nazionalizzazione delle scuole, che esso ha realizzato in altri Paesi⁴⁵.

Voleva dimostrare che la netta chiusura sui finanziamenti della scuola privata riemersa nella prima parte del 1961 non era altro che lo specchio per le allodole delle sinistre, mentre la vera questione che si celava dietro era ideologica e politica, cioè l'eliminazione, su ampia scala, della possibilità della Chiesa di agire nel campo educativo.

Nella seconda parte del 1961 don Rastelli e il CCZ di Fermo, insieme alle altre associazioni cattoliche impegnate sul fronte dell'educazione, organizzarono iniziative come la "Giornata della scuola"⁴⁶, per diffondere tra i cittadini la necessità di sostenere politicamente l'educazione cattolica. Pubblicò su «La Voce delle Marche» un articolo in occasione della manifestazione il 24 settembre, in cui riportava fra l'altro le dichiarazioni dei vescovi marchigiani sul futuro della scuola cattolica in prospettiva della discussione alla Camera dalla quale, a loro giudizio, poteva «uscire tanto una legge ispirata a concetti di sana e cristiana democrazia, quanto una decisione retriva [...] contraria alla dignità della persona umana, al diritto della Famiglia e della Chiesa e allo stesso prospero sviluppo della nazione»⁴⁷. Il sacerdote fermano ribadiva il pensiero dei vescovi:

l'apologia della scuola statale come fosse l'unica avente diritto di vivere, non è una lode ma un'insidia allo Stato: si pensa che, deprezzata e ridotta a zero l'influenza della Chiesa

⁴⁵ Rastelli, *Sul fronte della libertà*, cit., p. 9.

⁴⁶ Nella primavera del 1961 il sacerdote fermano ebbe uno scontro a distanza, attraverso la pagine de «L'Espresso», con Eugenio Scalfari. Cfr. Leoni, *Preti e Politica*, cit., pp. 82-88.

⁴⁷ A. Rastelli, *Tutta la Chiesa guarda la scuola. La dichiarazione dell'Episcopato Marchigiano*, «La Voce delle Marche», vol. LXX, n. 39, 1961, p. 2. Nel FSDAR è contenuto anche il dattiloscritto originale dell'articolo, due fogli, con le indicazioni per la pubblicazione e la firma di don Rastelli, F. 0.

nella scuola, sia più facile, prima o poi, passare dalla scuola statale alla scuola laica, dalla scuola laica alla scuola atea. È per questo che in tutte le Nazioni soggette al giogo marxista, il primo passo verso la scristianizzazione del popolo fu e ed è la soppressione delle scuole della Chiesa⁴⁸.

In un opuscolo poi diffuso durante l'organizzazione della giornata della scuola si ribadiva come l'articolo 33 della Costituzione andava considerato in base anche agli articoli precedenti (3, 29, 30, 31). Se lo Stato infatti avesse negato ogni contributo economico alle istituzioni educative cattoliche, avrebbe annullato o limitato «eccessivamente la libertà di scelta della scuola»⁴⁹.

In un altro dattiloscritto dell'ICE intitolato *I cattolici e il piano decennale della scuola*, quasi sicuramente scritto da Rastelli, si mettevano in luce i punti del confronto emersi in Senato e soprattutto ciò che preoccupava le associazioni come la FIDAE e l'ICE⁵⁰ nella prosecuzione del dibattito parlamentare. Si leggeva:

La discussione al Senato divenne polemica soltanto su quei punti che la deliberata volontà dei rappresentanti di tutti i partiti politici, esclusa la DC, ha scelto per combattere i principi della libertà scolastica; costoro sostengono la priorità nel settore dell'istruzione della funzione educativa dello Stato rispetto all'iniziativa di qualunque altra istituzione ed esigono che soltanto alla scuola statale, anche in conformità alla loro interpretazione dei commi 2° e 3° dell' art. 33 della Costituzione, debba venire riservata la spesa che fa lo Stato per l'istruzione dei cittadini. La maggioranza ha ribattuto dimostrando che i diritti della famiglia, del cittadino-alunno e del docente alla libera scelta della scuola sono riconosciuti dalla Costituzione (artt. 2, 3, 29, 30, 31, 33, 34), la quale fissa inoltre precisi doveri anche finanziari per lo Stato, a tutela delle effettive libertà scolastiche. La discussione sui singoli articoli ha fatto introdurre alcune limitazioni o rinunciare anche a preesistenti disposizioni così che il testo approvato peggiora, rispetto al testo originario, le condizioni per le scuole non statali, aggravandole per le accresciute provvidenze limitate generalmente alla scuola gestita dallo Stato⁵¹.

Data la situazione politica, il documento esortava i cattolici a impegnarsi per favorire un adeguamento legislativo mediante un'azione di diffusione tra tutti i cittadini del contenuto del piano e dei pericoli che erano sopraggiunti con i successivi emendamenti della bozza iniziale. Le contestazioni fatte dalle associazioni cattoliche erano prevalentemente tre:

- a. l'impostazione del Piano è quasi esclusivamente statalista (si ricordi che il Ministro Medici a conclusione del dibattito al Senato, ha confermato questo

⁴⁸ *Ibid.*, p. 2.

⁴⁹ Cfr. *Per la giornata della scuola. Suggerimenti e schemi di conferenze*, «Docete», nn. 1-2-3, 1961, p. 6, FSDAR, F. 0.

⁵⁰ Per uno sguardo complessivo al riguardo si segnala R. Sani, *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011.

⁵¹ Quattro fogli dattiloscritti, non datati, dal contenuto si comprende essere probabilmente del 1961, firmati dalle associazioni cattoliche del campo educativo e da alcune associazioni dell'AC di categoria, pp. 1-2, FSDAR, F. 0.

- dato di fatto dichiarando che, sull'impegno finanziario previsto su una media di 138 miliardi annui, ben 133 sono destinati alla Scuola di Stato);
- b. è completamente ignorato il diritto educativo dei genitori solennemente dichiarato dalla Costituzione ed il conseguente diritto della libera scelta della scuola;
- c. è del tutto trascurato il diritto alla libera scelta degli insegnanti, che in pratica si trovano costretti ad avviarsi solo alla carriera di dipendente statale⁵².

Pertanto le richieste "più urgenti" che venivano avanzate riguardavano la legislazione scolastica della scuola materna e i fondi stanziati per essa e la possibilità di avere una scuola dell'obbligo anche per gli alunni delle scuole non statali, mettendo così i genitori cattolici nella condizione di scegliere se mandare il figlio in una scuola statale o cattolica.

Inoltre, a giudizio di Rastelli, le previsioni di spesa per gli organici della scuola dovevano essere fatte in vista di «procurare tante classi da accogliere tutti i possibili alunni degli otto anni della scuola dell'obbligo [...] sia per [quelli] che accedono alle scuole statali come a quelli che vanno alle scuole non statali». La nuova legislazione, quindi, nella visione del sacerdote fermano, avrebbe dovuto favorire l'attuazione degli articoli costituzionali che incoraggiavano lo sviluppo della personalità rimuovendo gli ostacoli «di ordine economico e sociale» e attuando la possibilità della famiglia a essere aiutata «con misure economiche – art. 31», in modo tale da ottenere la gratuità dell'istruzione dell'obbligo⁵³.

La contrapposizione si aggravò in vista della concretizzazione dell'apertura a sinistra sostenuta da Moro nel Congresso DC del gennaio 1962 a Napoli⁵⁴. Tre giorni prima don Rastelli, insieme ai presidi degli altri istituti cattolici della regione, aveva scritto una lettera indirizzata al segretario della DC per metterlo in guardia riguardo alla situazione sempre più pesante che si stava creando per la scuola cattolica⁵⁵. Per il sacerdote fermano il diritto di educare i propri figli spettava alla famiglia, mentre lo Stato doveva intervenire in modo «sussidiario e suppletivo». Don Rastelli sosteneva infatti che «la famiglia rispetto al *figlio* gode di una priorità logica, cronologica, ed ontologica nei confronti dello stato. *Lo stato senza la famiglia è inconcepibile, mentre non è l'inverso*»⁵⁶. Queste preoccupazioni risultarono giustificate dal corso degli eventi. Al Congresso la

⁵² *Ibid.*, p. 2.

⁵³ Cfr. Sei fogli dattiloscritti, non datati e non firmati, presumibilmente di don Rastelli e da pubblicare su «La Voce delle Marche», FSDAR, F. 0.

⁵⁴ Si vedano: F. Malgeri (ed.), *Storia della Democrazia Cristiana*, Roma, Cinque Lune, 1987-1990; Id., *L'Italia democristiana. Uomini e idee del cattolicesimo democratico nell'Italia repubblicana (1943-1993)*, Roma, Gangemi, 2005; F. Traniello, *Città dell'uomo. Cattolici, partito e Stato nella storia d'Italia*, Bologna, il Mulino, 1990; A. Giovagnoli, *Il partito italiano. La Democrazia Cristiana dal 1942 al 1994*, Roma-Bari, Laterza, 1996.

⁵⁵ Cfr. «La Voce delle Marche», vol. LXXI, n. 4, 1962, p. 2. Si vedano anche i due fogli dattiloscritti datati 23 gennaio 1962, FSDAR, F. 0.

⁵⁶ A. Rastelli, *Lo Stato educatore-istruttore?*, Associazione Nazionale Scuola Italiana (ANSI), Fermo, Tip. «La Rapida», 1965, FSDAR, F. 0.

corrente di centrosinistra prevalse determinando gli esiti successivi della politica democristiana⁵⁷.

Nel 1974, dopo che ormai la politica di centrosinistra aveva sempre più allontanato la logica parlamentare della DC dalle direttive della gerarchia ecclesiastica, e un anno prima di lasciare tutti gli incarichi, Rastelli scrisse l'opuscolo *I Convitti Cattolici* che si proponeva anzitutto di rispondere a questa domanda: «è il caso che la Chiesa ancora si preoccupi di mantenere e istituire i convitti cattolici?»⁵⁸. Questo opuscolo può essere considerato come un sintetico programma educativo che il sacerdote fermiano stava sviluppando in quel periodo. In esordio si leggeva:

È bene preliminarmente intendersi sulle strutture e le finalità di un convitto. Si tratta di una istituzione che normalmente è aperta ai giovani che frequentano le scuole della città, in cui è eretto il convitto. Pertanto i giovani vi sono presenti, dati gli orari scolastici, in prevalenza nel periodo pomeridiano. Ad una visione puramente praticistica può apparire che gli addetti ai convitti si limitino all'assistenza scolastica, cioè all'avvio dei giovani alla scuola, alla verifica delle presenze e periodicamente del profitto. A una presentazione generica l'istituzione eserciterebbe una influenza educativa solo quando i giovani effettivamente vi soggiornano. Per il resto sarebbe fuori di ogni possibile intervento educativo⁵⁹.

Nella parte dedicata alla trattazione del tema, *La Chiesa e il convitto*, sosteneva che il convitto da lungo tempo era parte dell'azione della Chiesa e della sua missione. Infatti scopo dei convitti era «formare giovani cristiani per la vita». Egli stesso, però, riconosceva che la società stava cambiando, «il convitto – scriveva – viene contestato come ogni altra opera della Chiesa». Si poneva allora la questione se i convitti esistenti conservassero la loro funzione e se la società necessitasse anche di nuove strutture. Come egli riportava, due tesi si fronteggiavano: quella favorevole ai convitti e quella contraria. Al riguardo scriveva:

Ci sono alcuni, in genere, che sostengono che ormai i convitti hanno fatto il loro tempo, perché non sono più adatti per i giovani di oggi, che vogliono vivere intera la loro libertà e la loro responsabilità. In particolare, per quanto riguarda l'influenza della Chiesa, si ritiene che i giovani di oggi sono molto insensibili ai nostri tentativi di evangelizzazione. Essi contrastano troppo con l'attuale società permissiva, di conseguenza la vita cristiana viene considerata in genere dai giovani troppo «seria». Un'altra ragione sembra evidente. Dopo tanto lavoro speso, e per tanti anni, non si costatano risultati positivi, tangibili e immediati; anzi c'è qualcuno che sostiene perfino che i nostri convittori alla fine si dimostrano peggiori dei giovani comuni. Per cui, ogni attività volta alla formazione dei giovani si è rivelata pressoché inutile e si sono sciupate forze assai preziose. Le difficoltà sopra accennate si ricollegano alle stesse del convitto, che non può evitare un ordinamento puramente burocratico di rapporti, fondati sull'idea del «direttore», del «prefetto» e di una disciplina

⁵⁷ Cfr. R. Pertici, *Chiesa e Stato in Italia. Dalla Grande Guerra al nuovo Concordato (1914-1984)*, Bologna, il Mulino, 2009, pp. 493-494.

⁵⁸ A. Rastelli, *I convitti cattolici*, Fermo, Tipografia «La Rapida», 1974, p. 3, FSDAR, F. 0.

⁵⁹ *Ibid.*, p. 3.

a carattere casermistico o giù di lì. Verrebbe così a cadere l'elemento più fondamentale e formativo, che sono la spontaneità e l'amicizia. In definitiva, si ha l'impressione che tutta la problematica del convitto si riduca all'assistenza scolastica dei giovani, agli interessi scolastici dei giovani, dei genitori ed anche degli educatori per un certo prestigio e utilità pubblicitaria della istituzione, a cui sembra legata la sua sopravvivenza. Le finalità educative sarebbero subordinate e sacrificate a quell'unico scopo. C'è inoltre da considerare, si dice, che il convitto assorbe e sacrifica personale ecclesiastico in numero troppo elevato e che potrebbe molto più proficuamente essere utilizzato in altre attività, tanto più che la società attuale presenta, con ogni evidenza, nuovi bisogni spirituali, e problematiche di apostolato vitali per la cristianità⁶⁰.

A queste argomentazioni Rastelli contrapponeva le ragioni di coloro che sostenevano invece la persistente validità di una istituzione come il convitto.

Oggi masse di giovani sempre crescenti frequentano le scuole con fenomeni vistosi di spostamenti verso le città in cui specialmente funzionano scuole tecniche. Dove vivranno questi giovani? Come potranno essere assistiti seriamente sia dal punto di vista scolastico che formativo? Molti vagano alla cieca presso famiglie private, il cui unico scopo è il lucro. E allora? Come non pensare a un convitto? Esso costituisce una preziosa occasione di contatto con i giovani, utilizzabile per una profonda formazione nei confronti delle famiglie lontane dei propri figli. È evidente che la famiglia è molto più tranquilla quando sa che il proprio figlio è sotto l'occhio vigile di sacerdoti dedicati esclusivamente a loro, di sacerdoti che mantengono frequenti contatti con le famiglie e con la scuola che i giovani frequentano. Quindi, si conclude che tali istituzioni mantengono oggi il loro significato e la loro particolare ragione di essere⁶¹.

Rastelli considerava la cultura cattolica in serio pericolo, minacciata dal vuoto etico provato dalla secolarizzazione e dal consumismo. Nel primo capitolo, *Il convitto come autentica esperienza umana e di chiesa*, il sacerdote fermano sosteneva che, in ragione di questo pericolo, occorre un forte impegno da parte di coloro che reggevano le sorti dei convitti. Al riguardo affermava:

Per togliere gli ostacoli alle vere relazioni e arrivare allo stile di un convitto cristiano, è necessario: sgonfiare gli slogan offrire dei veri valori, di cui mettersi alla ricerca insieme: giovani adulti e famiglie. I giovani danno e ricevono. Noi siamo uomini in società. Il giovane non è solo. Bisognerà dunque dargli il senso della responsabilità nel mondo di oggi, coltivare il gusto del rischio, non ipotizzare sull'insicurezza che è inerente la vita; di qui la necessità di un progetto comune da difendere nelle sue grandi linee. [...] L'educatore dovrà avere un solo costante desiderio di dare una cultura vera, di suscitare un'attitudine un'inquietudine di ricerca, e di assaggio, attraverso la pedagogia, di non pensare una nozione senza percepire che questa nozione si integra nel contesto storico, sociologico, filosofico⁶².

Per Rastelli, il giovane doveva gradualmente maturare il proprio senso di responsabilità in un clima di libertà, in modo da saper esercitare l'autonomia

⁶⁰ *Ibid.*, pp. 4-5.

⁶¹ *Ibid.*, p. 5.

⁶² *Ibid.*, pp. 7-8.

del proprio volere in una società che stava cambiando, diventando sempre più «pluralistica». Gli educatori del convitto avrebbero avuto il compito di «aiutare il giovane a vivere da cristiano sotto tutti gli aspetti e in ogni circostanza della vita senza cadere nella tentazione del relativismo e dello scetticismo»⁶³. Come fare? A tale domanda rispondeva caldeggiando la linea del dialogo con i giovani sui temi di attualità, «persuadendoli e stimolandoli – sosteneva – a vivere oggi nei nostri istituti gli atteggiamenti di domani, organizzando il convitto come una piccola società vivente, nella quale si approfondisca anche lo studio dell'animo del giovane per farlo rimanere vicino a Dio in mezzo alla descritta società pluralistica»⁶⁴.

Altro fatto da tenere presente, secondo Rastelli, era l'ambiente scolastico, anch'esso pluralista, nel quale per un ragazzo in via di formazione era facile smarrirsi. Egli avvertiva che nel cambiamento della società anche i giovani stavano mutando, che perfino nella famiglia, in relazione all'età dei giovani, si richiedeva il loro parere, in particolare per le decisioni che li riguardavano personalmente. Rifacendosi alla «Civiltà Cattolica», delineava un quadro a tinte fosche della società contemporanea, una società in cui il lavoro educativo delle famiglie e dei convitti stava divenendo sempre più difficile.

Nel secondo capitolo, *Partecipazione attiva all'educazione*, il processo formativo veniva descritto come esperienza di partecipazione e di dialogo. La partecipazione nasceva dalla collaborazione e dal confronto costante. Per lui andavano lasciati alle spalle paternalismo e autoritarismo, non «certo in nome di un orizzontalismo qualunquistico», bensì in nome dei valori spirituali che il giovane possedeva e del rapporto di amicizia che doveva essere la condizione indispensabile alla base dell'educazione. Il dialogo, affermava, era «il legame e l'accordo tra persone umane, tra le loro intelligenze, le loro volontà e il loro cuore, e proprio nel convitto vorremmo escludere un simile rapporto di alta spiritualità, quando specialmente si tratti di un convitto cattolico?»⁶⁵.

Rastelli si interrogava anche sulle attività più consone agli interessi dei giovani cercando di capire le motivazioni di tali interessi. Anzitutto interessi scolastici: i giovani dovevano essere assistiti anche fuori dalla scuola nei loro bisogni e nelle loro difficoltà. Occorreva che nel convitto vi fosse una biblioteca, meglio se «qualificata in senso cristiano», delle attrezzature per lo sport e per i divertimenti nelle ore libere. Ciò serviva al convitto per «perdere molto del suo carattere di pesantezza e noia», che spesso i giovani vi accusavano. Un altro aspetto importante era dare valore ai contenuti più che alle forme. A tal proposito sosteneva che in passato ci si era preoccupati soprattutto della disciplina e della organizzazione e poco dei contenuti.

⁶³ *Ibid.*, p. 9.

⁶⁴ *Ibid.*, p. 9.

⁶⁵ *Ibid.*, p. 11.

Per il sacerdote fermano poi era molto importante la formazione cristiana dei giovani. A suo avviso i convitti devono essere un momento di «esperienza di Chiesa ossia di fede e di amore». In tale contesto era rilevante la figura del sacerdote educatore, che era l'animatore della vita dei giovani nel convitto. Un ruolo importante veniva assegnato anche al direttore spirituale, il quale radunava i ragazzi per la preghiera e per l'eucaristia, «vertice del momento ecclesiale». Nella formazione cristiana il momento liturgico-sacramentale non era mai separato dalla evangelizzazione, perché, secondo don Aleramo, l'annuncio «del Vangelo, della Buona Novella e sacramento, sono momenti essenziali della pastorale»⁶⁶. Per una seria opera di evangelizzazione reputava essenziale formare una *élite* di giovani cristiani, che, all'interno del mondo giovanile, sapessero comunicare convinzioni e stili di vita consoni al cristianesimo.

Nel 1974, don Rastelli, pertanto, riteneva ancora attuali i convitti, in particolar modo quelli cattolici dove i giovani apprendessero il senso di appartenenza alla comunità dei credenti in Cristo. Per dare ai convitti questo carattere occorreva un «rinnovamento profondo, una mediazione cristiana ecclesiale, una meditazione incessante e approfondita della Chiesa»⁶⁷.

Sperava che una rinnovata evangelizzazione fosse capace di contrastare l'avvento della società permissiva. Per realizzare tale evangelizzazione riteneva significativa la vita del convitto impostata con metodi meno gerarchici, attenta alla persona dello studente, strutturata per trasmettere un'esperienza di fede non ossessionata dal conteggio delle pratiche sacramentali. Affermava infatti «non si tratta certo di accantonare o mettere in sottordine un Sacramento bensì di preparare, come si è detto, una mentalità più idonea a celebrarlo con frutto»⁶⁸. L'opuscolo si poneva inoltre anche l'obiettivo di applicare in ambito pedagogico e formativo i principi di collaborazione del clero con i laici espressi nel Concilio.

In ultima analisi, Rastelli sosteneva che «non è possibile democrazia senza libertà della scuola, non è possibile libertà della scuola senza democrazia». Lottava perché l'offerta educativa cattolica, composta da scuole e convitti, e quella di Stato, con una adeguata legislazione, potessero essere messe in concorrenza senza per questo aumentare gli oneri a carico dello Stato; anzi ciò avrebbe comportato solo un miglioramento della proposta educativa di entrambe. Diceva, inoltre, che negli ambienti educativi e scolastici, bisognava far vivere ai giovani, «gli atteggiamenti di domani»; che occorreva «sgonfiare gli slogan offrendo dei veri valori, di cui mettersi alla ricerca insieme: giovani adulti e famiglie».

⁶⁶ *Ibid.*, p. 15.

⁶⁷ *Ibid.*, p. 17.

⁶⁸ *Ibid.*, p. 15.

Conclusioni

Nel 1975 Rastelli dovette lasciare ogni incarico e gli ultimi due anni di vita furono caratterizzati da una malattia che lo alienò dalla realtà. A causare tutto ciò contribuirono in modo determinate le profonde modificazioni in atto sia in società sia all'interno della stessa Chiesa. Il Concilio e il post-concilio avevano aperto nuovi scenari dove il modello dei Comitati civici era stato di fatto sostanzialmente superato. Dal punto di vista educativo poi la scuola cattolica, oltre che per la politica di centrosinistra attuata dai diversi governi DC nel corso degli anni Sessanta, entrò in crisi per lo più a causa dell'accelerarsi del processo di secolarizzazione che mutò profondamente sia la cultura sia i costumi degli italiani. Gli aspetti che ebbero un ruolo fondamentale per il superamento dell'offerta scolastica cattolica furono le rilevanti migrazioni interne e l'urbanizzazione con le considerevoli modificazioni della vita sociale, prime fra tutte quelle che riguardarono lo sviluppo dei mezzi e vie di comunicazione⁶⁹. Si può osservare appunto come proprio nel periodo 1965-1975 entrò in crisi nel suo insieme il sistema educativo cattolico composto prevalentemente da scuole e convitti.

Non è errato sostenere, in ultima analisi, che il sacerdote capì che la società stava cambiando e che il cattolicesimo era entrato in una nuova fase storica. Non avvertì, però che per affrontare tutto ciò non bastava il semplice aggiornamento dell'antico.

⁶⁹ Cfr. Scoppola, *La «nuova cristianità»*, cit., pp. 141-209.

Reincarnation of the vampire character in literature for children and youth in the *Twilight* series by Stephenie Meyer

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ABSTRACT: The vampire character experienced reincarnation in the literature for children and youth in the *Twilight* series by Stephenie Meyer. Numerous archetypal heroes have long found their place in this literature. Since his appearance in the Gothic literature during the Victorian fin-de-siècle, it took the vampire almost two centuries to cross this border too, i.e. to be found among the heroes whose adventures are followed by the young readers with great attention. Every moment of the vampire's appearance onto the literary scene is in connection with the *memento mori*, so it was reasonable that many of his initial literary features had to go through a series of metamorphic procedures so that the vampire would be entitled to a role in the literature for children and young people. Such changes did take place, along with the changes in the overall society, the modern childhood and growing up.

EET/TEE KEYWORDS: Literature for Children and Youth; Vampire Character; Literary Reincarnation; Literary Reception.

1. *Contemporary reception of fantasy in the literature for children and youth*

The already excellent reception of fantastic fiction amongst children and youth started in the twentieth century, and its popularity has even been greater during the 21st century. The opening of Pandora's Box full of mythical monsters was met with a receptive audience and in the literature for children and youth a reincarnation of all those creepy monsters and demons came about, the monsters which were created by the creator of the fantasy myth, our distant ancestor who was still unfamiliar with *logos*. Connotations that contemporary fiction for children and youth projects are not the same as they were during the *mythos* time, but they are still rich and polysemous. The interest of children and youth in this literature is clearly there, and it tells a lot about the recipients. In part, we recognize it as a «soporific escapism»¹, i.e. immature escapism and «blame» the reader for it, but given the fact that the young readers and children are just at the stage of growth, development and maturation and that the adults, especially parents and teachers, have and must have an educational influence on them, the educational actions of families and schools, which drive children into escapism, should be reviewed. On the other hand, the reception of these texts can clearly show the adults how the children and the youth experience the world. If the vampire has become a very important literary figure in this literature, it is assumed that the world as seen through the eyes of modern childhood and adolescence, is in fact, *sinister loci* where the most diverse ghosts and demon lurk.

Some of the ancient creatures have long been popular characters with young readership, but there were those who were not able to be brought in connection with children and young people. One such creepy mythical monster who even today «drinks blood» on pages of numerous novels, comic books, on TV, in opera and ballet, and even in picture books, is certainly the vampire. The fear the vampire spreads through the literary world stems from its association with human blood and its eternal and insatiable thirst for the elixir for eternal vampire youth. Vampires are the bearers of certain qualities that a man cannot reach - eternal life and youth, superhuman strength and speed, which in one way or another, are the universal human desires. Such a character, an undead character that floats around a thin line between life and death where it is sustained only by fresh human blood, could hardly walk through the gates of literature intended for the young reader. However, at the turn of this century, the vampire finally overcame this barrier too and came to the scene of literature for children and youth.

The modern planetary popularity of *Twilight Saga* by Stephenie Meyer or, say, *Vampire Diaries* by L. J. Smith, opens up a whole range of issues related

¹ D. Cavallaro, *The Gothic Vision: Three Centuries of Horror, Terror and Fear*, London and New York, Continuum, 2002, p. 17.

to its reception by children and youth. The characters of these novels are significantly different compared to earlier vampires, for example, those from the Victorian era. They are much closer to the human race, much less creepy (at least at first glance), some of their characteristics are closer to the status of the victims than predators, and some ethical standards that apply in some «vampire circles» can be considered exceptional. In any case, the vampires have achieved a significant role in the literature for children and young people, partly due to the fact that «contemporary Western culture constructs adolescence as a time of particular anxiety, a transitional phase between childhood *innocence* and adult *knowledge*»², so that «in the new Teen Gothic of texts like *Buffy the Vampire Slayer* (1997-2003) and *Ginger Snaps* (2000), teenagers are more likely to be the demons than the victims»³. It is important to keep in mind another opening idea and it is the fact that the new characters of vampires have an exceptional need for affiliation and socialization, so that «as well as becoming the subject rather than the object of the narrative, the modern vampire, rather than being solitary like Stoker's Count, desires companionship»⁴. So, in the novel of Swedish novelist John Ajvide Linquist *Let the Right One In* (2008)⁵, the main character is an abused twelve-year-old boy Oscar. The boy suffers violence both at home and at school, and his true and sincere friend becomes a vampire Eli who is 200 years old. In the case of this novel, lonely and helpless, abused and neglected Oscar is only offered help and support by a vampire.

In this paper we are analysing the development of vampire characters, their roles in myths and literature and, in particular, a number of meanings that it conveys. The central problematized aspect are the literary evolutions that have resulted in the transfer of the vampire character from the horror genre to the literature for children and youth and the role the vampire acquires in this literature. In the initial stage of considering this subject – the vampire as a literary character in the literature for children and young people – it is already quite clear that the notional layer of such texts must be viewed through different prisms because the polysemy is provided by the vampire history itself, causes and conditions of his creation.

2. *The origin and development of literary vampires*

The actual origin of the vampire is mythical, and the vampire became a literary hero in the horror genre during the Victorian era, in the field of the

² C. Spooner, *Contemporary Gothic*, London, Reaktion Books, 2006, p. 91.

³ *Ibid.*, p. 29.

⁴ D. Punter, G. Byron, *The Gothic*, New Jersey, Blackwell Publishing, 2004, p. 271.

⁵ See J.A. Linquist, *Let the Right One In*, New York, Thomas Dunne Books, 2008.

so-called Gothic literature. The literary forerunner of horror in the sense of the supernatural and the otherworldly is a myth, a tradition inherent to all nations. The mythical world is a world before the foundation of science, it is a polytheistic (multi pagan) concept of understanding the existing universe. The myth is, in turn, created as a reaction to fear, which is after all, according to some scholars also an agent for emergence of religion, because:

It was fear that initiated the establishment of faith and religion. It was the fear of unknown and mysterious phenomena, which people could not explain otherwise than via impersonating a high power, which decides their fates. To every unexplainable phenomenon they attributed a character, human or inhuman, which they associated with supernatural skills and invincible power. And since the human imagination knows no limits, a wide scale of archetypal characters have been created⁶.

Fear was the initiator of religion, but also of myth and fear has introduced many characters to the literary world. Fear of death is one of the primordial human fears, the vampire is its incarnation. The initial vampires, the forevampires, acquired the basic characteristics of the species from their inception – they are related to death, they should be in the world of the dead, but for some reason, they do not go there, but remain among the living. We call them the *undead*. Vampires have an unquenchable thirst for and drink fresh human blood. At the beginning of their existence both in the myth and the literature, they are the creatures of the night. Sunlight, which symbolises life, is deadly for these creatures.

The vampire, therefore, was created a long time ago, long before he entered the literary scene. Theresa Bane's⁷ *Encyclopedia* shows that all ancient civilizations recognized the vampire as an essential constituent of everyday life. In mythology, the vampire had a significant role and served as an explanation for many phenomena that could be connected with blood. Vampiologist Theresa Bane says that all vampires that are an integral part of the mythologies share «basic human fear. No matter when or where, how it hunts or what it hunts, the vampire attacks that which man considers most precious»⁸. Her *Encyclopedia* includes legends of vampires from all over the world and, in addition to the aforementioned common characteristics, it shows that the characteristics of vampires, their power and their emergence are in many ways different. Further differences occur between the vampires from mythology and traditions and those that appear in literature. After playing a vital role in creating a mythical image of the world, the vampire continued to exist in real life serving various religions as a culprit in real accidents which, especially during the Middle Ages,

⁶ V. Proházková, *The Genre of Horror*, «American International Journal of Contemporary Research», vol. 2, n. 4, 2012, pp. 132-142.

⁷ T. Bane, *Encyclopedia of Vampire Mythology*, Jefferson, North Carolina, and London, McFarland & Company, Inc., Publishers, 2010.

⁸ *Ibid.*, p. 2.

were numerous. The church fathers ascribed epidemics, infections, viruses and other monsters to the forces of evil whose confirmed ally was the vampire.

The so called Gothic literature appeared during the Victorian epoch and its main characteristic was a dark colouring, a sense of ruin, falling apart and rotting. The atmosphere of degeneration of society and the individual, which was placed by the Gothic in the weathered, ancient castles, was ideal for the first role of the literary vampire⁹. An important basis for the literary organization of the vampire character is precisely the spirit of the age in which he appeared, i.e. the so-called spirit of Gothic literature. It is the period in which the grey and gloomy tones were particularly appreciated, dark stories enriched with mythological creatures or fantasies of monsters that had emerged in some other way – say, Frankenstein was created by a scientific experiment. The dark Gothic fiction is an ideal stage for a beginning of a literary career of vampires. In Gothic literature vampire is a character in the horror for adults, he is otherworldly and connotes a pure evil from another world. There are no child characters, although places of uncertainty are related to the existence of these characters, because Lucy Westenra, a character from the novel *Dracula* and three count's Romanian female vampires attack even children. The first Gothic vampires were members of the nobility, which is a very realistic procedure with regard to how the characteristics of the higher social groups were perceived in reality. We have already mentioned religion as an important guardian of the vampire phenomenon from the period of myth to its appearance in the literature, but in addition to religion, in these early stages of development of the literary vampire, science in a certain way strongly contributed to its revival, and science has proved to often be a fertile source of fears necessary for the birth of new vampires.

Bram Stoker, the author of the first very important vampire novel *Dracula* (1897)¹⁰ lived at the time when a new wave of research stimulated by Darwin's evolution theory threatened to bring down the «good ideas» according to which the man was far above other beings and had nothing to do with them. He was practically a figure created by God, according to God's character. However, Darwin came to the conclusion that among living world there is a clear connection and kinship, which, of course, had adverse effects on human «self-love». Indeed, the loss of status of God's favourite and most perfect among all creatures, the constant development of science in unimaginable directions, had to lead to a return of the human perception to previous stages. Hence the return to the myth, revival of the mythic interpretation and the mythic monsters. Even after this initial contribution to the inauguration of the vampire character in literature, science was often involved in vampire narratives, and in some periods of «discoveries in the sciences only served to aggravate a sense of alienation

⁹ See Cavallaro, *The Gothic Vision: Three Centuries of Horror, Terror and Fear*, cit.

¹⁰ B. Stoker, *Dracula*, 1897. rpt. Harmondsworth Penguin, 1984.

and further disturb notions of human identity»¹¹. Say, in the significant R. Matheson's novel *I am Legend*¹² (1954), a wave of vampire transitions comes as a result of a failed scientific experiment. The fear of uncontrolled science is equal in its intensity to what Theresa Bane called «basic human fear» which is the cause of the existence of vampires.

3. *The development of a literary vampire character*

We can distinguish between two basic types of the literary vampire. The first type is related to the vampires such as Dracula, an initial literary figure of this kind. These vampires are mainly observed from the outside in the novels, that is, the reader has no insight into their inner world. They are described by other characters who are in contact with them. For instance, *Dracula* is an epistolary novel, written in the first and third persons, as a part of a letter, diary, newspaper article, providing a point of view of many people, observers and participants in the events. The only one who does not express his own view of the events is the main character, Count Dracula. So Stoker keeps the reader at a safe distance from the creepy Count. We make conclusions about the figure of the vampire based solely on the impressions of human characters. Naturally, these characters of vampires seemed like a dangerous threat to humans; they originate in myths, and they were given the properties of certain historical personalities, certain recognized tyrants. Up to 1976, when Anne Rice's *Interview with the Vampire* was published almost all the vampire characters belonged to this type. Louis makes his appearance in this novel, the vampire who carries some of the new features – he is aware that his vampiric immortality carries many negative qualities. It is very clear to him that he does not belong anywhere – neither the living nor the dead, which he sees as a horrible fate. Louis talks about himself and communicates his own feelings, views. The reader enters his inner world and gains the ability to identify with him. Precisely this literary procedure of Anne Rice's opening of the vampire's inner psychological life to the audience will enable the vampire kind to get closer to people. From Louis from *Interview with the Vampire*, who tells the tragic confession of his curse of immortality and shows himself in the role of a victim, who did not choose such a path, begins a new phase of the vampires' literary career. In the role of genuine victims, the vampire becomes a character who is easy to identify with, and who is possible to be interiorised.

The status of a victim, an innocent and helpless hero is one of the key milestones in the literary vampire metamorphosis that will give him the necessary

¹¹ Punter, Byron, *The Gothic*, cit., p. 20.

¹² R. Matheson, *I am Legend*, New York, Tom Doherty Associates, LLC, 1954.

ticket to the world of literature for children and youth. It is important to point out that Louis does not describe himself as a victim. On the contrary, he sees himself as a monster, and the reader is the one who realizes that the assessment of the main character is wrong and that, in fact, Louis is a victim with an evil predestination.

Since the appearance of the first vampire to the present day, there was no period when they were marginalized characters in literature, but it is indeed noted that their popularity is not the same on the time continuum. There are literary epochs which appreciate them a lot more, as well as those periods when the vampire is only one among other monsters. Leblanc mentions many interpretations of this literature in the social context of changes. He points out the impressiveness of the connection between the character of society and morphology of vampires¹³ and shows that «the idea of a correlation between vampire morphological variability and social change has been discussed by numerous scholars»¹⁴. Indeed, there are numerous articles that establish links between society and the historical period, i.e. the spirit of the epoch on one side and vampires on the other. Research shows that every age has its own vampires through which the image of social fears is expressed, but also of the repressed desires¹⁵. The vampires of our time are very often similar to children and young people, and generally target them, a literary fact which should be considered with a serious attention in order for us to gain real insight into the overall situation of the modern childhood and adolescence.

4. *The atmosphere of crisis as a vampire's stage*

It has been mentioned already that the confessional tone of the vampire is the main literary procedure that allowed this character to become closer to the man, and therefore more vulnerable, and to turn into a hero in the literature for children and young people. The society has definitely encouraged and facilitated the reincarnation of vampires in this literature. Ontology of vampires sometimes helps us to understand a number of questions relating to the ethical principles, issues of social and personal values, the role of the family and school, human groups in general ecc. Corrizzato and Goracci point out that the good and the evil are no longer clearly separated concepts in the new civilization, which is an extremely important position in consideration of this fiction that basically

¹³ B.H. Leblanc, *The Death of Dracula: A Darwinian Approach to the Vampire's Evolution*, in C.M. Davison, P. Simpson-Houseley (edd.), *Bram Stoker's Dracula – Suckin'g Through the Century 1897-1997*, Toronto, Oxford, Dundurn Press, 1997. pp. 351-374.

¹⁴ *Ibid.*, p. 353.

¹⁵ N. Auerbach, *Our Vampires, Ourselves*, Chicago, University of Chicago Press, 1995.

presents itself as a world where the struggle between the good and the evil is a basic principle of organization. Speaking of the modern times, they point out:

The codification of a new world, whose main parameters are the supernatural, the unknown and the darkness, can help common people to detach themselves from their daily fears to enter a confused dimension, whose spatial and temporal coordinates are completely subjective. Good and evil are not clear concepts anymore, and rational and irrational melt to create an intermingled architecture where any limit of transgression is neutralized¹⁶.

With a full approval of the above view, in addition to blurred boundaries between the good and the evil, which is more than obvious, we observe the temporal and spatial coordinates mentioned in the statement as particularly relevant. Namely, people have never crossed distances so quickly, have never been pressed by the passage of time, but on the other hand have never been less attached to one locality or one group to which they belong. This lack of attachment and a real alienation can be powerful factors of disintegration and disorganization of the human personality, and therefore a clear connection with a radical civilizational change. Gothic literature was created in «the atmosphere of crisis and decadence»¹⁷, and all the periods thereafter in which the return to vampire narrative was happening can, according to several criteria, be recognized as a time of crisis.

In earlier times people established the border between the good and the evil by means of different mechanisms. A particularly strong «gate keeper» for a long period was the church and religion in general. Of course, there were other ways to set limits, and for them to be largely maintained. But today's impacts of faith in most of the civilized world is more than weakened, a modern man hardly has any time to wonder about the ethical issues. Of course, to children such boundaries and a clear division between good and evil are especially important. After all, all fairy tales, their favourite reading, teach them that there is both good and evil, but that justice, which is to be fought for, will always be on the side of the former. In a state in which the boundaries between good and evil are not clear not even to adults, children are in a serious crisis, and the mythologized world becomes closer and clearer to them than the real one because in this world they have the opportunity to see clear boundaries. And the vampire is in this context particularly important because he, by his core characteristics, is a borderline creature – between the two worlds (the world of the living and the dead), two vital principles (Eros and Thanatos) and two intervals of light (day and night or light and darkness).

¹⁶ S. Corrizato, G. Goracci, *Televised Undead: An Interdisciplinary Approach to the Conceptualization of Vampires in Contemporary TV Shows*, «European Scientific Journal», vol. 2, special edition, 2013, pp. 457-467.

¹⁷ A. Murga Aroca, *Victorian Vampires: Cultural Anxieties in Nineteenth-Century Gothic*, «JACLR: Journal of Artistic Creation and Literary Research», vol. 1, n. 1, 2013, pp. 28-44.

It is certain that the adult world seems rather vague to children and young people, somewhat confusing. All social groups, beginning with the family, are now under strong changes which are brought about by the spirit of the epoch in which science, engineering and technology bloom, in which efficiency is what is sought in an individual, his/her quick adaptation to new conditions and serious disregard of all the activities that do not lead to direct material productivity. Trying to cope with the era of competitiveness, adults often neglect everything apart from their personal professional development. Clearly, the man loses integrity in this way, ignores the motive of affective attachment and social belonging, so that family and upbringing of children slip out his control. In this race of adults with generally accepted ideology of success, many children are left without family security and warmth. Under such circumstances, an old vampire friend is welcome.

In the vampire world of *Twilight saga* (*Twilight*¹⁸, *New Moon*¹⁹, *Eclipse*²⁰, *Breaking Dawn*²¹) by Stephenie Meyer, boundaries and a number of rules clearly continue to apply. The Volturi are the guardians of the order. All the vampires who belong to this ancient coven originate from Greece while their seat is an ancient city of Volterra in Italy. They are the foundation /base/ source of peace and civility, therefore their awareness and need to translate the chaos into order and discipline on which the civilized, ordered world lies. It is no coincidence that Italy is a place of their residence and the centre of their spirituality, the seat (with underground halls) of their power. The Volturi are the «mirror image» of world powers today, of the contemporary world order. By means of tradition and advancement of power, they won for themselves the position of those who run the world of vampires, those who set the rules which they zealously protect.

5. *New vampires and their world. What young readership finds in the world of new vampires?*

Hundreds of years of life experience, sleeplessness and exploring many places, times and people brought some vampires into situations in which they are even «morally superior to human beings»²². Such are, for example, the Cullens from *Twilight saga* by Stephenie Meyer, and Louis from *Interview with a vampire*²³,

¹⁸ S. Meyer, *Twilight*, London, Atom Books, 2005.

¹⁹ Ead., *New Moon*, London, Atom Books, 2006.

²⁰ Ead., *Eclipse*, London, Atom Books, 2007.

²¹ Ead., *Breaking Dawn*, London, Atom Books, 2008.

²² N. Rowen, *Teaching the Vampire: Dracula in the Classroom*, in C.M. Davison, P. Simpson-Houseley (edd.), *Bram Stoker's Dracula – Sucking Through the Century 1897-1997*, Toronto, Oxford, Dundurn Press, 1997, pp. 231-245.

²³ A. Rice, *Interview with the Vampire*, London, Sphere, 1976.

Stefan Salvatore from the *Vampire Diaries*²⁴. If they continue to maintain their dominant feature – to warn us of something very bad by causing some of our fears, causing our vigilance in front of danger, then one of the ideas for consideration is certainly the one of moral issues. The world as it is today, with unclear boundaries between good and evil, and with so many different systems of values is too open to personal and individual moral views and attitudes. Dangers that result from them are an integral part of our everyday lives, we face the social phenomenon of «aggressive incompetence» of individuals, their desire for absolute power, for the use of man, for the enslavement of his mind. Also, there is a tendency for «improvement» of the human species, accelerating of the growth and development so that the individual would be able to assume, as soon as possible, a number of complicated roles and tasks in the society. Stephenie Meyer «solved the problem» of such an improvement by cross-breeding the human and vampire genome in *Twilight*. Renesme Cullen represents a hybrid creature who possesses the best human and vampire traits – she quickly matures, learns and grows and what is especially important, even in prenatal age she interacts with the world around her.

While the earlier vampires – uncontrolled, impulsive and animalistic – were isolated from human society, the new vampires learn self-control, and teach the readers the demanding skill and, of course, show us the necessity of sacrifice. This need – to give up something that we strongly desire – certainly belongs to the group of meta-needs. It is not easy to meet because there is a conflict on the one hand of our *id* (carried by a strong basic impulses), and on the other of our *ego* and *superego*. The example of vampires shows us how demanding self-denial is, but we also see how much it is needed if one wants to function along the others and not to be rejected. And the new vampires have a great need to belong to someone – to be a part of the community where they're going to make serious contributions, so some vampire narratives, such as *Twilight*, promote love and family life, meet the needs of young readers for affective attachment. Thus, in case of Bella Swan Cullen, the main heroine of *Twilight* love is noted as an agent for the acceptance of the vampire world, i.e. «love is therefore the motivation of her intention to become a vampire, not merely the fascinating desire for immortality or the fear to grow older»²⁵. Bella is portrayed as a teenager who does not fit well in a peer group, nor has a sufficiently clear and close ties with divorced parents. She does not share the interests of other teenagers, but as the narrator in *Twilight* she clearly expresses this:

²⁴ L.J. Smith, *The Vampire Diaries*, New York, HarperTeen, 2014.

²⁵ A. Sanna, *The Postmodern Evolution of Telepathy from Dracula to the Twilight Saga*, «Gothic Studies», vol. 15, n. 1, 2013, pp. 66-75.

I didn't relate well to people my age. Maybe the truth was that I didn't relate well to people, period. Even my mother, who I was closer to than anyone else on the planet, was never in harmony with me, never on exactly the same page. Sometimes I wondered if I was seeing the same things through my eyes that the rest of the world was seeing through theirs. Maybe there was a glitch in my brain²⁶.

Everybody sees her as very mature in the psychological sense, so she tells her vampire, Edward «my mom always says I was born *thirty-five years old* and that I get more middle-aged every year»²⁷, and this is obvious from her behaviour – in many ways she takes care of his mother and father by the system of swapped parent – child roles.

Vampire Edward Cullen represents for Bella an embodiment of all her desires and someone who wants to share with her eternity. He very successfully takes care of her, because Bella is portrayed as a very shiftless young girl, a real magnet for trouble. This infantile position of hers, between a woman and a child, portrays her as a very fragile heroine who definitely needs help and protection. Her psychological and physical coordination and resourcefulness are in the function of invocation of a strong and powerful mythic archetype, such as vampire. A patriarchal division of male and female roles is obvious in *The Twilight Saga*, as well as very traditional romanticism with the powerful role of marriage and family.

So we came up to a romantic image of the vampire – alone (Edward Cullen had been on his own for almost a century), misunderstood, without his own fault and decision sentenced to eternal life, and thus to lots of acting in order to adapt to the society of ordinary people. The vampire loneliness is more intense than the loneliness an ordinary man might feel. Vampires generally do not sleep, or sleep very short periods of time, so that at no times have they the ability to escape from their own thoughts, from consciousness and conscience. If they are also very committed to ethical issues, which Cullens, the vampires from *Twilight* are (questions about the soul, sin of immortality, not taking human blood), then we have a picture of a vampire who not only is he behind ordinary mortals, but, he furthermore needs their sympathy and understanding. The new vampires seem not to belong anywhere – they are somewhere in between the world of their kind and the ordinary human world. The fact that they are trying to change the traditional vampire habits and not to feed on human but animal blood, that they see themselves as monsters and the like, make them, by their ethical development, unacceptable for their kind. Again, they cannot fully belong to the human world. This characteristic is, again, something that is close to children and young people, something they strongly feel.

The initial literary vampires are animalistic predators – they meet their primary needs in an animalistic fashion and do not have much time or interest

²⁶ S. Mejer, *Sumrak [Twilight]*, Beograd, Evro Giunti, 2010, p. 17 (in Serbian).

²⁷ *Ibid.*, p. 94.

to deal with some of the higher ideas and objectives. They were very much like other common villains and monsters. However, this concept has caused saturation of the audience and brought the vampire on the same level with any other type of a «bad guy», which makes the thrill of adventure lose its appeal. Therefore, the new vampire characters are significantly more developed psychological portraits. They themselves communicate their inner world and are much more than just villains. As they themselves got the chance to be storytellers, «the vampire becomes «domesticated», as the focus changes from the human to the Other's viewpoint»²⁸.

It is interesting that the more the vampires are connected with people, the more socialized they are – they suffer more, they become vulnerable. This is a very logical motive because socialization makes them «more human» and suffering naturally goes together with this element. Therefore, the split vampire, i.e. «his otherness makes him stand out for the heroine, whose mission is to save him from his dark nature by accepting him as such, thus enabling his redemption»²⁹. Rather than a romantic one, the vampire's «quest for heroine» provides an immense field of connotations. Rejected, unaccepted, unsociable, and eager for love and belonging, young readers are looking for the fairytale frame for resolution of their loneliness. Of course, their age is naturally prone to such a need. Childhood and growing up in the modern technically and technologically advanced society carries ever so much challenges. Thus, «the whole paranormal romance subgenre is built on the exploration of the vampire as a romantic, tragic and often misunderstood creature»³⁰.

Such vampires' romantic line is clearly seen in *Twilight*. Vampires are in love, they suffer, have lofty goals in love, do not want to hurt somebody. Edward demonstrates the highlight of vampire romance who, thinking that his eternal love, Bella, is dead, decides to ask the Volturi (old vampire family, «guardians of secrets» in the vampire world) to destroy him. In that sense «the figure of the vampire comes out of the screen and becomes the personification of our innermost desires and aspirations, avoiding any kind of physical or spiritual boundary»³¹. In addition, *Twilight* has shown another deviation of vampire literature from the genre of horror – «sexuality, in fact, is a more common theme in the modern vampire tale than horror»³² and this phenomenon, understanding and development of sexuality, represents an extremely important issue to young categories of readers, practically the central issue of growing

²⁸ C. Gosa, A. Šerban, *The vampire of the third millennium: from demon to angel*, «Océanide», vol. 4, 2012, <<http://oceanide.netne.net/articulos/art4-10.php>> (last access 04.05.2017).

²⁹ *Ibid.*

³⁰ J. Maberry, D.F. Kramer, *They Bite. Endless Cravings of Supernatural Predators*, New York, Citadel Press, 2009, p. 27.

³¹ Corrizato, Goracci, *Televised Undead: An Interdisciplinary Approach to the Conceptualization of Vampires in Contemporary TV Shows*, cit., p. 466.

³² Maberry, Kramer, *They Bite. Endless Cravings of Supernatural Predators*, cit., p. 27.

up and understanding the world of adults. In *Twilight* Meyer formulated the resolution of this part of maturing in a very patriarchal way, which was met with approval and sympathy from young readers. A hundred-year-old innocent vampire, such as Edward, brought into the world of teenagers the smell of knightly romanticism of the early twentieth century, the time of his actual human youth.

The new vampires have many more conserved human qualities than their ancestors of Dracula's generation, perhaps because they feed on animal blood, their awareness is rich, the intellect is constantly in operation, and there are many ethical dilemmas. Centuries of age left a serious mark on the intellectual and ethical sphere. Besides this, they have the concept of human repentance, are aware of their sinfulness and reasons for their own marginalization. Clasen states that «present-day stories about attractive vampires and their human girlfriends have more to do with mate choice and romantic dilemmas than with the fear of being eaten by a fearsome predator or infected by an unclean organism»³³.

Some of the new stories about vampires are often focused on the relationships among teenage peers, relations between young people and their parents, teachers and other adult authority, and this is what *Twilight* is all about. Different complex human and social relations that teenagers face are given realistically. There are meetings and social relations, love and various sexual relationships and commitments with the possibility of radical change in the emotional attitude – from the devastating passion of hatred to love, acceptance and rejection, rejection, loneliness, loss, violence and destruction, the family, divorce of parents, outdated schools, the construction of self-identity, violence in the family and school, the acceptance or rejection of diversity. Destroyed families are common and practically standardized in this world. In such a situation it is logical that teenagers need to seek or create some kind of social community that could compensate for the loss and disappearance of the family.

The Cullens, the main Meyer's vampires deal, in the best possible way, with all human affairs. The parents, Carlisle and Esme are the prototype of the «desired» parental figures – they clearly and responsibly perform parental roles, they carefully raise their adopted children (although vampires) introducing them to the world in which they live with the utmost responsibility. They manage even to empower them to become vegetarians – the Cullens feed on animal, not on human blood. Carlisle is a doctor, which is an additional challenge for his natural instincts. Every day he is confronted with human blood, but he has an iron will – he has a full control over himself and his own needs. He learned to abstain, perfecting power of self-control and this concept he successfully transfers to his adopted children.

³³ M. Clasen, *Attention, Predation, Counterintuition: Why Dracula Won't Die*, «Style», vol. 46, nn. 3-4, 2012, pp. 378-398.

Bella's parents stand in stark contrast to the Cullens. They are divorced, her father lives a provincial life – from work to TV screen, and occasional fishing trips. Her mother never successfully «grew up». Bella is protective over her – as if the mother–daughter roles were completely exchanged. While Bella thinks about her mother and communicates with her, it is obvious that the mother is seen as the one who needs protection and support, as a person who is not mature enough and independent. When it comes to decisions, Bella is left to her own devices – neither of the parents (despite the fact that they are basically good people) can help her. It is therefore no wonder that Bella experiences the Cullens so strongly and specifically – as a real family that protects its members, helping them in making decisions and taking care of them. The Cullens show readers exactly the importance of preserving the family, which recipients recognize because:

Intrusion, disintegration, and threats to the harmony of the family and community appear to be common themes in postmodern US-America. Numerous other genres, receptive to the modality of the fantastic, reflect this disturbing trend toward disintegration of family and community and the cultural wars surrounding it³⁴.

Of course, the disintegration of which Zipes speaks is not characteristic only of the modern American family. It is rather a feature of the modern developed society which is increasingly becoming a slave to technology and race for economic security and wealth.

Norma Rowen, considering the possibility of teaching the interpretation of the vampire, concluded that the young vampire is an interesting character for three basic reasons: a) «the shadow and the connection between such acknowledgement and the popular habit of vampire victims somehow inviting the vampire in»³⁵; b) connectedness of vampires with alienation and marginalisation and c) immortality³⁶. Teenagers are, as production and reception in a significant number of countries shows, very interested in the new fiction whose physical laws and causality are not described by the known laws of physics. They are fascinated by the phenomena that are on the verge of the impossible. Michio Kaku, a famous physicist offers a very interesting research study on the connection between the physics of the impossible and contemporary fantasy fiction³⁷. Kaku explains certain fantastical motifs from popular novels for children and young people by connecting them to the three classes of impossible in modern physics.

³⁴ J. Zipes, *Why Fantasy Matters Too Much*, «CLCWeb: Comparative Literature and Culture», vol. 10, n. 4, 2008.

³⁵ Rowen, *Teaching the Vampire: Dracula in the Classroom*, cit., p. 234.

³⁶ *Ibid.*, p. 234.

³⁷ See M. Kaku, *Fizika nemogućeg* [Physics of the Impossible], Smederevo, Heliks, 2011 (in Serbian).

6. «*The poison*» of the Cullens

In general, the vampire represents the one who infects the individual and the society. There are numerous connotations in this direction interpreted in connection with *Dracula*. Of course, the new vampires are owners of vampire venom and they cause infection. What is the «virus» of the Cullens? They are extremely beautiful (which connotes the immense importance of modern aesthetics and cosmetic surgery, «refinement» of everything that is not perfect in accordance to modern times), have eternal life, they drive fancy cars, dress fashionably, all of them, even at an early age by human standards, are financially independent and wealthy, have the perfect family, they all love and respect each other, support each other, they are very educated, cultured, and even graceful. Meyer even mentions their extraordinary handwriting. When they do sports, they are the best in sports too. The tendency «to be better than others» and «be the best», is in many ways a likely cause of frustration for many children and young people. Clearly, it is not their choice to participate in such a competition with peers and others. The adults are the ones who have created such circumstances, so that the child-vampire hybrid such as Renesmee Cullen, who rapidly progresses, learns and grows up is the obvious ideal to which the reproduction of the human species should (not) aspire. The global society has perfected the technique and technology and technical communication options to extraordinary levels, but the man has not evolved enough to be able to follow the development of «his handiwork». Therefore, he often does not cope with the reality that he himself formed, so from Meyer's novel we may expect the improvement of the human race by crossing it with someone or something like vampires.

Of course, what is particularly important to children and young people is the fact that vampires have power. Power is what is a desirable ideal in these categories of readers. The dependence of children and young people on the world of adults affects their need to strongly identify with the literary figures who hold power. Stephenie Meyer's vampire conception is considered to be quite original, but the basic underlying concept of vampire power and their sources, as well as inexplicability of some of them is also present in *Twilight*. For instance, each of the members of the Cullen coven has some special powers and aptitudes: Alice can see the future (provided that the decision was taken about an occurrence); Edward can read minds to everyone but Bella; Jasper can control the emotions of all the people around him; Carlisle has a special compassion; Esme has a very strong maternal instinct; Rosalie is incredibly beautiful, and she too has a strong maternal instinct; Emmett is particularly strong. Even the new member Bella has a special affinity to create and develop a shield around those whom she needs to defend. It is interesting that not all vampires have such, special powers. In addition to the fact that they live in communities (covens in *Twilight*) and that only some of them have special powers (whereby not all of

them have same capabilities) we note additional initiation of a social moment in the stories about vampires. At the beginning of their literary careers they were treated and viewed as outcasts, rejected, isolated and segregated from society. However, in the new adventures they connect with each other, trying to establish peaceful life with ordinary mortals, some even with their natural enemies. An obvious example of this are the vampires of Stephenie Meyer. The Cullens live like a family, a family that has all the attributes of a traditional community in which all members are loved, nurtured and connected by strong emotions and responsibility. The storytelling in *Twilight* is characterised by abundant detail, so that some authors believe that «*Twilight* and *True Blood* vampires, in this sense, are successful deconstructions of monstrosity in our time with their emphasis on family life, patriarchy, heterosexuality, urbanization, and consumption practices»³⁸.

With Cullens Meyer brings back the traditional romance to fantastic literature, which is another powerful conceptual wave. The Cullens are an extra-ordinary American family, and:

The Cullens of *Twilight* are typically representative of middle class American values with their emphasis on patriarchy, family life, heterosexuality, education and consumption. They are nestled in a family of close ties that underline masculine strength and protection as well as feminine tenderness and devotion³⁹.

The contrast between the vampires' actual situations and their overall behaviour in their own circles and in the wider social community is very strong. The horizon of expectations of readers has exactly been betrayed by the most persistent «vegetarianism» of vampires and their way of life – family, love, responsibility towards school and work. The new vampires of Stephenie Meyer are such that the readers can very easily be identified with them, considering them good role models, so it is quite acceptable to claim that «we are entering the age of the vampire»⁴⁰.

7. *An escape from reality into a fairy-tale world*

Escape from reality, however, goes both for the *Twilight* heroes and its readers. After all, fiction is built as a world that provides significantly different

³⁸ M. Mülazimoğlu Erkal, *Every Generation Gets the Vampire It Deserves: Change in Vampire Identity in Contemporary Supernatural Fiction*, «International Journal of Language Academy», vol. 2, n. 3, 2014, pp. 157-169.

³⁹ *Ibid.*, p. 162.

⁴⁰ D. Schuller, *Something Black and of the Night – Vampirism, Monstrosity, and Negotiations of Race in Richard Matheson's I Am Legend*, «Inklings-Jahrbuch», vol. 27, 2009, pp. 78-94.

vision from reality. Of course, even such a fictional world should give us insight into reality, although we do not search for its reduction to the real and tangible. Connotations that we read and decipher from the stories about vampires show very diverse insights into the state of mind of the modern reader. The popularity of *Twilight* amongst young readers undoubtedly hints their need for changes in real lives.

Twilight clearly suggests that there is still hope for a return to traditional values in the ordinary life. Its vampires are the holders of these value systems. They, by unfortunate set of circumstances, survived their own life and stayed amongst people to, in a way, convey to them the voice of their time, from the period which in hindsight seems very romantic, very «human» and, despite the dangers that even then threatened the man, it is a kind of oasis for the preservation of human communities, especially families. Thus, a vampire from the Age of Romanticism (Dracula) became a romantic character (Edward), the hero who in many ways suggests the fairy-tale idea of a «Prince Charming». He surpassed even the figure of the prince, because he does not only bring material wealth and status. Edward and similar vampires have the power of eternal life, they are the owners of «philosopher's stone», whereby they did not lose anything from the human essence because obviously they still have a soul. Reading narratives about them, that «infected» thousands of teenagers and young readers really takes away from reality and shows what the world of reality should look like in order to provide warmth, peace and security.

Cavallaro observes a very obvious connection between many fairy-tale motives and total semantic-structural characteristics of fairy tales with narratives about vampires. Thus, he singles out the importance and function of fairy tales in education and says:

Those stories, regardless of their more or less overtly dark themes and images, are implicated in hegemonic programmes that often aim at consolidating the status quo by prescribing standards of exemplary conduct for children and, by extension, for the adults into which they are expected to grow⁴¹.

It is true that fairy tales are popular educational reading and that through remarkable colouring of wonders of the world they are always trying to preserve the «old state of affairs», i.e. the order as it was before the advent of negative obstacles and it is especially important that they, in addition to a number of positive personality traits, still, promote obedience as a measure of the old order, i.e. of the existing world.

Bella is, in many ways, a typical fairy-tale heroine – she is good in the general sense of the word, responsible – she even takes care of her parents, she is hardworking both at home and at school, almost perfect. Practically in many ways she resembles a modern version of Cinderella or Snow White. By

⁴¹ Cavallaro, *The Gothic Vision: Three Centuries of Horror, Terror and Fear*, cit., p. 138.

her graceful behaviour, her physical beauty (which she is not aware of, which makes her an especially attractive «bite», not just for vampires and werewolves, but also for the humans), obedience and loyalty, she earned the prince who she belongs to after a series of bad events – all this constitutes a framework of the world of modern fairy tales. Like any typical gothic story, in *Twilight* «the collusion of childhood and femininity is reinforced through the positing of analogies between the vulnerability of the young and the helplessness of female characters persecuted by patriarchal authority»⁴². Bella is something in between a child and a woman, she is very vulnerable and shiftless, practically left to concurrence of circumstances. In many situations, the male characters get her out of a series of troubles. Edward and Jacob are her permanent defenders and rescuers, but her human companions, like Mike Newton, help her too, who save her out of some situations (like the ones in a gym class) that do not have such a dangerous character for anybody but Bella. In spite of the fact that in some parts of the text Bella was presented as a character who knows what she wants and does a lot of things so that she gets it, she is completely powerless without the world of men. This is a typical patriarchal, traditional aura of inauguration of the return of clear and unchanging male and female roles.

Meyer used a Victorian form to create the main female character, which can be interpreted in accordance with a pretty negative context about which Cavallaro writes:

The painting reflects the Victorian stereotype of woman-as-child, an ideal that aptly encapsulates male notions of female dependence and, at the same time, the cult of invalidism, whereby an infantile woman's surrender to illness constitutes the final form of self-obliteration and evidence for her self-sacrificial proclivities⁴³.

Bella is extremely well suited to the mentioned code «woman-as-child» in the sense of awkwardness and fatal helplessness. As for the self-sacrifice of women, it is brought to the highest possible level in *Breaking Dawn*. Bella's pregnancy and childbirth, during which she loses her human life show a complete subordination of her own life to the unborn child and the family. Even Edward cannot stand Bella's situation during pregnancy and childbirth. However, she made a decision typical of a woman-victim and does not deviate from it at any cost.

More or less inspired by the typical Gothic literature, Meyer, however, placed her own narration in a world of darkness, so her vampire world is compatible to the organization of dark forces that have their roots in Gothic literature. As much as Meyer's vampires, especially those positively pictured are different from their typical evil literary ancestors, they bring to the narrative «various incarnations of otherness. Sexual, racial, physiological, political and economic

⁴² *Ibid.*, p. 144.

⁴³ *Ibid.*

forms of degeneration and abomination coalesce in the depiction of the blood-drinker»⁴⁴. In this sense, her novels, especially their outstanding reception by teenagers, suggest a certain amount of understanding of the needs of the reading audience for changes in the real world. Vampires and werewolves bring connotations that decipher the state of mind of young people, or, as pointed out by D. Cavallaro:

Thus, although darkness is associated with a regressive state, it vibrates with vitality and creativity. It is imperative to acknowledge these qualities, since what is commonly demonized as evil may actually open our eyes to valuable experiences and submerged levels of reality. Darkness can be enlightening⁴⁵.

And with the darkness of *Twilight* it is the same case. Many typical beasts are present – typical evil vampires, the possibility of their multiplication and rampage which represent a serious danger, but their counterweight is not an ordinary human being who cannot defy them, of which we have evidence in the text. Defence against them is possible only by a new vampire force, the one that comes from super vampires as creatures who united the best vampire and best human qualities.

Exactly *Twilight* can serve as an example that «contemporary Gothic is not preoccupied with the end of the world, but rather the end of innocence»⁴⁶. In this regard, of course, is the «mirroring» of vampires. Namely, by the 70's of the last century the vampires did not have a reflection in the mirror. This feature is associated with human characters that are reflected and their personalities. The fact that the man does not see the vampires in the mirror is interpreted in such a way that the vampire is basically a part of a man in front of the mirror, that is, the dark side of his personality, which he fears to admit even to himself. Indeed, recognizing the existence of the vampire character in the mirror the man is on the threshold of «the end of innocence».

8. *Final considerations*

Many connotations that vampires carry are not visible enough to today's young readers. This applies to all those initial layers of ideas that vampires present by means of their borderline nature, but also to many other connotations that are presumed from particular motivations. Thus, it is unlikely that the young readers would pay special attention to the fact that, for example Aro, Caius and Marcus originate from Greece, that they reside in Italy – two cradles

⁴⁴ *Ibid.*

⁴⁵ *Ibid.*, p. 24.

⁴⁶ Spooner, *Contemporary Gothic*, cit., p. 23.

of ancient cultures (ancient Greek and Roman) – and therefore symbols of the ancient world. The other vampires too who participate in the events in *Twilight*, are mostly native Europeans, and it is interesting that Europe is still responsible for keeping order and the secrets of the vampire world. Thus, Aro, Caius and Marcus founded the ancient city of Volterra in Italy as the seat of the guards of the vampire secret. It is certain that, thanks to other literary and film achievements, these European cities can even today seem exotic, but all potential connotations that accompany them are not the focus of the reader's attention. Also, the connotations that Carlisle's father brings and which are related to the medieval inquisitorial persecutions can pass almost unnoticed by the young reader. What young readers recognize as a separate layer and what makes *Twilight* and similar popular narratives popular worldwide are certainly the messages about the connection between human beings and the importance of family and the power of love.

The vampire is a borderline being, he acts between the world of the living and the dead, his food is fresh human blood and in literary texts he shows the whole spectrum of connotations. In order for the vampire to aspire to play an important role in the literature for young readers, it was important to change certain literary procedures. Thus, the key initial gothic narrative about vampires, like Stoker's *Dracula* (1897), did not provide the reader an insight into the inner world of the main vampire. He is portrayed by other heroes and was seen as a transcendental monster. However, in 1976 the literary innovation in this field will appear in Anne Rice's novel *Interview with Vampire*. In this text, the vampire Louis is the main narrator who tells the story of his life. He sees himself as a monster, but the reader perceives him as a victim. So the vampire becomes a victim character, a hero with whom one can identify and who can be interiorised. His very position of the victim, an inferior position and predetermination to unwanted eternal life make him similar to a child and a teenager, and this opens the possibility for identification with him.

Twilight Saga series (2005-2008) by Stephenie Meyer is particularly globally popular. Its main vampire characters cause a lot of positive reactions and are even highly desirable models of behaviour from the perspective of traditional values. We have shown how the vampire family from *Twilight* works and what it is in their behaviour that inspires young readers around the world to delightfully follow every detail which is shown in the world of the novel. The Cullens are an improved vampiric race – instead of human blood they feed on animal blood, and consider themselves vegetarians. Having learned to fight real vampire nature, which is thirsty for human blood, the Cullens have built an entire system of ethical norms, they represent role models that young readers can identify with without difficulty. They are a harmonious and powerful coven (family) in which all members have full help and support of others. Their family image is practically idyllic and attracts the attention of young readership. The traditional vision of romance and eternal love of Bella and Edward was crowned

by the birth of a new example of evolution of humans and vampires – a super child and a super vampire Renesmee Cullen combines supernatural powers of vampires with the best human traits. Young readers around the world have shown strong interest in *Twilight*, so the understanding of this phenomenon is imposed in order to grasp the image of the world that children and young people perceive in the contemporary society.

Cossío's European tours between 1879 and 1889

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ABSTRACT: Manuel B. Cossío (1857-1935), was Educational Museum director in Madrid and the first university professor of pedagogy in the Spanish University. In addition, he was president of «Patronato de Misiones Pedagógicas», rector of the «Institución Libre de Enseñanza» and an art critic, who rediscovered El Greco to the contemporary world. Cossío is the most important reference point to understand the educational reforms in Spain from 1883 to 1933. This article analyzes his trips between 1879 and 1889 in which he established a network of contacts with other European educators, which allowed him to appreciate the value of his own pedagogical practice and to join the international pedagogical movements. In those years Cossío toured several European cities, visiting innovative schools, art and pedagogical museums, attending international teaching congresses and studying carefully the school reforms that each country was carrying out. In the trips he met a lot of great educators. As a consequence of the exchange of ideas with these educators, the visits to schools and other educational establishments, Cossío collected an important amount of information with which to tackle the reforms in Spain. At the same time it served him to evaluate the scope and originality of the pedagogical practice carried out by the «Institución Libre de Enseñanza».

ETT/TEE KEYWORDS: History of Education; Educational trips; Transnational Education; Fröbelianism; Spain; XIX-XXth Centuries.

Introduction

The «Institución Libre de Enseñanza» (ILE) represents a pioneering educational movement of exceptional importance both within Spain and on a European level. Founded in Madrid 1876 by Francisco Giner de los Ríos (1839-1915) and a group of university professors who disagreed with official policies that prohibited teachers from explaining concepts at odds with the

dogmas of the Catholic Church, it soon became the driving force behind educational and social reforms in the period between its foundation and the start of the Spanish Civil War in 1936. For sixty years, Giner and his followers, particularly Manuel Bartolomé Cossío (1857-1935)¹, built up contacts with a wide range of liberal, free-thinking European educationalists, introducing a programme of reforms into Spain that spanned numerous fields and aimed to construct a democratic State and a free citizenry through the spread of public education.

As a school, the ILE introduced sports in 1882 and developed a working method based on the concept that pupils could learn outside the classroom. ILE members visited the most isolated, remote villages, collecting traditional stories and items of folk art with which they decorated their houses. They banished textbooks, practiced co-education and were the first in Spain to introduce manual activities into Primary education as well as the first in Europe to use them in Secondary schooling. The ILE was also a vigorous reform movement within Spanish society, encompassing numerous areas of culture, science, politics, art, literature and education. It was a collective that evolved a «spiritual communion» of an almost limitless kind and one that influenced the prevailing mood in the country and reached many parts of Spain. Among the figures associated with it in a variety of ways were scientists such as Cajal and Severo Ochoa, poets such as Antonio Machado, Juan Ramón Jiménez and García Lorca, feminists and pacifists including Concepción Arenal, María Goyri and Berta Wilhelmi, historians such as Rafael Altamira and Américo Castro and various generations of generous, enthusiastic educators who would subsequently occupy an important role during the Second Republic in Spain (1931-1936)².

The earliest positive responses to the ILE's teaching practices from abroad deserve special attention. The *Report of the Commissioner of Education*, published in Washington in 1884, includes a positive text that singles out the ILE's reforming intentions and spirit of freedom, as well as the fact that

¹ For Cossío, see E. Otero Urtaza, *Manuel Bartolomé Cossío. Trayectoria vital de un educador*, Madrid, CSIC/Residencia de Estudiantes, 1994.

² The ILE and the bodies created under its influence in Spain have generated a vast bibliography that has grown ceaselessly over the past few years. Still extremely useful as an introduction to the phenomenon is the book by L. Luzuriaga, *La Institución Libre de Enseñanza y la educación en España*, Buenos Aires, Universidad, 1957. On teachers under the Second Republic see, for example, *Las Misiones Pedagógicas 1931-1936*, Madrid, Sociedad Estatal de Conmemoraciones Culturales/Publicaciones de la Residencia de Estudiantes, 2006. The most recent joint study that has been published on ILE is the three volumes that make up the work *La Institución Libre de Enseñanza y Francisco Giner de los Ríos: nuevas perspectivas*, Madrid, Fundación Francisco Giner de los Ríos & AC/E, 2012. This work involves more than seventy academics and is the best current source to know this phenomenon of modernization of Spanish society. The ILE was dismantled at the end of the Spanish Civil War by the Franco regime, which considered it a promoter of the revolutionary movement.

it had unified Primary and Secondary School teaching methods³. An article published in «The Times» on 2 October 1884 noted that the ILE's school was the only one on mainland Europe that aimed to emulate the English approach to education through the principles of mental sobriety, personal liberty and physical development, using outdoor sports and games that accustomed young people to assume individual responsibility from their earliest school days. Moreover, the article celebrated the fact that among European schools, it was the one that organised the most school excursions. It is not necessary to record further testimonies of this type in order to indicate that the relationship between the ILE and the European educational movements of the last third of the 19th century was particularly close⁴, and that Giner, Cossío and their followers became aware of the merit of their educational activities through their early trips, during which they undertook first-hand observation of the schools on which they set out to gather information.

ILE pedagogy was at this period involved in an international reform movement that reacted against dogmatic educational systems dominated by the Catholic clergy and characterised by an ideology hostile to Enlightenment thinking. While the ILE had its own unique and distinguishing traits, it is worth analysing how it proceeded to find out about pedagogical ideas in other countries and to focus on the educationalists who most influenced the construction of its conceptual basis. This can be done by looking at the trips that some of the Spanish educationalists and followers of Giner made around Europe. Among the most important, perhaps, for the subsequent evolution of the ILE were those undertaken by the young Cossío between 1879 and 1889, during which he assembled a large amount of information and established numerous personal contacts that explain the context of internationalisation⁵ in which Giner's followers participated over the following years.

³ *Report of the Commissioner of Education for the year 1883-'84*, Washington, Government Printing Office, 1885, pp. CCXXXII-CCXXXIV.

⁴ E. Otero Urtaza, *La relación de la Institución Libre de Enseñanza con los movimientos pedagógicos europeos*, in *La Institución Libre de Enseñanza y Francisco Giner de los Ríos: nuevas perspectivas*, cit., vol. 2, pp. 436-457.

⁵ The term «internationalisation» is used here not only in the sense of «crossing frontiers» but in reference to a phase that preceded more complex social interactions and networks in which «national identity» was constructed through the «increase in contacts». See M. Caruso, H.E. Tenorth, *Introducción. Conceptualizar e historizar la internacionalización y la globalización en el campo educativo*, in Id., *Internacionalización. Políticas educativas y reflexión pedagógica en un medio global*, Buenos Aires, Granica, 2011, pp. 27-32.

1. *Cossío makes contact with European pedagogy*

Trips made by 19th century European educators can be described as the knots in a mesh that allow for an understanding of how a vast pedagogical movement interconnected, how it gave rise to a «broadening of horizons of reference»⁶, and how these encounters between educationalists and their first international meetings functioned to spread a culture of teaching that created «practices of meaning assignation»⁷, which in turn established the model or norm to be followed but which also helped to construct models of national identity.

In the mid 19th century the railway facilitated easier communication between the different countries of Europe, while with regard to the dissemination of ideas, the Universal Exhibitions and the early international conferences on education and teaching brought together a group of thinkers who were currently introducing new ideas and practices into school systems in their respective countries and who took the first steps towards the construction of an «international interconnection of education»⁸. These encounters initially contributed to *knowledge of the «other»*⁹, but over the course of time they established a common theory on the system and organisation of teaching and on teaching material, as well as a set of models of action that began to be shared. Schriewer refers to the importance of these «examples from abroad», which introduced «stimulating ideas» assimilated from the countries considered most advanced, thus allowing for «transnational observation». The result was «a network of reciprocal references that took on their own life, encouraging, reinforcing and energising the universal spread of ideas, models, standards and options for educational reform», with the result that a more homogenous, global discourse was gradually created¹⁰.

The transnational discourse was undoubtedly modified and interpreted as it came into contact with local realities that had their own educational tradition, often provoking a degree of rejection in the assimilating society, obliged to debate ideas arriving from outside that promoted changes in established models and which competed for acceptance and implementation. Cossío's example is a typical one. Between 1879 and 1889 he undertook a series of trips that had

⁶ M. Caruso, *World systems, world society, world polity; theoretical insights for a global history of education*, «History of Education», vol. 37, n. 6, November, 2008, p. 827.

⁷ Id., *The Persistence of Educational Semantics: Patterns of Variation in Monitorial Schooling in Columbia (1821-1844)*, «Paedagogica Historica», vol. 41, n. 6, 2005, p. 722.

⁸ J. Schriewer, *Sistema mundial y redes de interrelación: la internacionalización de la educación y el papel de la investigación comparada*, in Caruso, Tenorth, *Internationalización. Políticas educativas y reflexión pedagógica en un medio global*, cit., p. 46.

⁹ A. Nóvoa, T. Yariv-Mashal, *Comparative Research in Education: a mode of governance or a historical journey?*, «Comparative Education», vol. 3, n. 4, 2003, pp. 424-425.

¹⁰ Schriewer, *Sistema mundial y redes de interrelación: la internacionalización de la educación y el papel de la investigación comparada*, cit., pp. 90-93.

a double consequence: firstly, he was able to verify the importance and extent of the educational changes coming about in various European countries, and secondly, these trips allowed him to locate the importance of the ILE's educational practices in the context of a broader movement with which he shared many of his intellectual ideas. What, then, did he learn from these trips? With which educators did he feel most affinity and what did they contribute to his vision of education? What did he think about what he saw in relation to his own practices as an educator? This text will now attempt to analyse some important issues relating to these trips and their consequences.

Cossío's first study trip was to Italy, where he stayed at the Colegio de San Clemente de los Españoles in Bologna between November 1879 and June 1880. He was sent there by Giner following the foundation of the ILE Primary school in 1878 with the intention of making it the model for the reforms that he aimed to introduce into Spanish public education. In Bologna, Cossío made contact with the educationalist Siciliani and travelled to various different cities during the period of his stay. He met Terencio Mamiani and Thomas Davidson¹¹ in Rome, Adolfo Pick¹² in Venice, and Giovanni Bovio¹³ and Julia Salis Schwabe¹⁴ in Naples. Cossío ended his trip in Brussels where he took part in the International Teaching Conference organised by the Ligue Belge de l'Enseignement. On the way there he stopped in Zurich to visit its educational museum, while in Winterthur he met Heinrich Morf, who possessed an important body of documentation on the Instituto Militar Pestalozziano in Madrid.

Brussels would remain a reference point for Cossío throughout his life. The aim of the above-mentioned Conference was to present the ILE to an international audience and to give a paper on school trips. This lecture led on to the start of his friendship with Alexis Sluys. «If Don Francisco could get hold of him!» was Cossío's reaction after their first conversation. Sluys had been the director of the École Modèle in Brussels for five years, after which he became director of the École Normale until his retirement in 1909. At the latter school he implemented a series of pedagogical innovations that could

¹¹ Thomas Davidson (1840-1900). Cossío met Davidson and Mamiani in Rome at the Castellani family's evening gatherings. He had just undertaken an extensive walking tour around the whole of Greece that lasted eight months according to Cossío.

¹² Adolfo Pick (1829-1894). A Krausist and Froebelian philosopher, he was the first promoter of the Kindergarten concept in Italy. See A. Cagnolati, *La educación de la primera infancia desde guarderías de caridad a los jardines fröebelianos (Venecia, siglo XIX)*, in J.L. Hernández Huerta, L. Sánchez Blanco, I. Pérez Miranda (coords.), *Temas y perspectivas sobre educación. La infancia ayer y hoy*, Salamanca, Globalia Ediciones, 2009, pp. 121-130.

¹³ Giovanni Bovio (1837-1903). A politician, philosopher and professor at Naples University. See S. Blasucci, *Giovanni Bovio: ambiente, personalità, pensiero filosofico, ético, giuridico, político*, Roma-Bari, Fratelli Laterza, 1990.

¹⁴ Julia Salis Schawbe (1819-1896). A member of the Froebel Society in London, she was at this point promoting the Kindergarten concept in Naples.

immediately be tested against current practice. Charles Buls, president of the Ligue de l'Enseignement, entrusted Sluys with the École Normale with the aim of extending the experience of the École Modèle to all public schools in Belgium¹⁵.

Cossío was inspired by the atmosphere at the conference. In addition to the École Modèle, during those days he visited the Free University and on 24 August attended the inauguration of the Educational Museum in Brussels. Above all, however, he was impressed by a pedagogical culture that was not constrained by any obedience to the clergy and which had a dynamic teachers' movement that did not feel compelled to obey the instructions of the Catholic Church. This was an unimaginable situation in Spain at that time, as would become evident two years later during the National Pedagogical Conference [Congreso Nacional Pedagógico] held in Madrid, when conservative factions joined forces against the reforming aspirations of the ILE, the teachers of which hoped to pass measures that would enable them to make use of intuitive methods and organise school trips.

On 6 May 1882 the Educational Museum in Madrid was founded by decree. It was the first public organism to be created since the ILE had started to exercise a notable influence on Spanish education. Giner wanted Cossío to prepare himself to become its director and the latter thus made a forty-day trip visiting educational museums and schools that employed innovative methods in a number of European countries¹⁶. On Cossío's third trip he was accompanied by Giner. On 27 September 1883, they arrived in Lisbon with the aim of visiting the city's schools and of learning about the reforms currently being introduced by Teófilo Ferreira¹⁷, supported by Feio Terenas¹⁸. Cossío had already met Ferreira in Brussels in 1880. He and Giner visited various schools in the city in the company of Ferreira and Terenas, but they were more impressed by Adolfo

¹⁵ A. Sluys, *Memoires d'un pedagogue*, Brussels, Editions de la Ligue de l'Enseignement, 1939, pp. 97-99.

¹⁶ See in E. Otero Urtaza, *Manuel B. Cossío's 1882 tour of European education museums*, «Paedagogica Historica», vol. 48, n. 2, 2012, pp. 197-203. In addition, by the same author, *Las primeras expediciones de maestros de la Junta para Ampliación de Estudios y sus antecedentes: los viajes de estudio de Cossío entre 1880 y 1889*, «Revista de Educación», número extraordinario 2007 (*Reformas e innovaciones educativas (España, 1907-1939) En el centenario de la JAE*), pp. 54-57.

¹⁷ Teófilo Ferreira (1840-1894). Director of the Escola Normal in Lisbon from 1873 until shortly before his death. A politician, journalist, doctor but primarily an educationalist, he promoted the foundation of the Rodrigues Sampaio School. See A. Nóvoa, *Dicionário de Educadores Portugueses*, Lisboa, Asa Editores, 2003, pp. 552-554.

¹⁸ Feio Terenas (1850-1920). A journalist and Republican activist. In 1881 he was appointed head of the municipal libraries in Lisbon, a position he held until 1911. Nóvoa, *Dicionário de Educadores Portugueses*, cit., pp. 1374-1376. Cossío and Giner contacted these individuals on the recommendation of Blas Lázaro, who, in a letter to Giner of 14 August 1883, told him that Terenas was the organiser of the municipal libraries while Ferreira was «the heart and soul of municipal teaching in Lisbon, undertaking a major reform project and supplying teaching material and furniture to all schools».

Coelho, whom they met and interviewed on 29 September. Coelho had been appointed director of the Municipal Educational Museum in Lisbon just a few weeks before and Cossío and Giner rapidly appreciated that his intellectual approach and pedagogical ideas were closer to their own than those of other Portuguese intellectuals. Coelho was already extremely well known in Portugal. He had been the cause of the suspension of the lectures given at the Casino in Lisbon in 1871 as a result of his lecture in which he had maintained that science was independent of religious beliefs, while in 1878 he was appointed Senior Professor of Comparative Philology on the Higher Humanities Course [Curso Superior de Letras] at Lisbon University. He had already produced an extremely extensive body of work as an ethnologist when, in 1883, the year of Cossío and Giner's trip, he published his first article in Spain in the *Boletín de la Institución Libre de Enseñanza*¹⁹, just weeks after his friends arrived in Lisbon. He subsequently became director of the Rodrigues Sampaio School, a position he held for some time and through which he aimed to emulate the reforms that the ILE were starting to implement. What possibly most interested Cossío and Giner about him, however, was his interest in Froebel's methods and the fact that he was attracted to a type of spiritual and mystic life that distanced him from the radicalism of some of his contemporaries such as Terenas and Teófilo Braga, with whom he would have serious disputes. Both Giner and Cossío established close friendships with Coelho that would last for many years and which are reflected in their interesting correspondence that began after this visit and which is documented up to 1902²⁰.

In 1884, Giner and Cossío went to London to participate in the International Conference on Education held in South Kensington. During this event Giner took part in a session, giving a paper on technical education at the ILE while Cossío spoke on the Educational Museum in Madrid, of which he had become director just a few months before. They stayed in Balliol College where they spoke for the first time with Jowett and John Tyndall and established numerous useful contacts through Stewart Henbest Capper²¹. They met up again with Russell Lowell, who had been British Ambassador in Madrid many years before, and met Miss E. P. Hughes, director of the female Training College in

¹⁹ *Notas mitológicas: el tangro-mangro y los turanios*, «Boletín de la Institución Libre de Enseñanza», [hereafter *BILE*] vol. VII, n. 144, 1883, pp. 37-41.

²⁰ E. Otero Urtaza, *Adolpho Coelho: as súas relación pedagóxicas e intercambio de ideas con Francisco Giner e Manuel B. Cossío*, in *Investigación e innovación na Escola Universitaria de Formación do Profesorado de Lugo*, Santiago de Compostela, Servicio de Publicaciones e Intercambio Científico de la Universidad de Santiago de Compostela, 2004, pp. 269-288.

²¹ Stewart Henbest Capper (1859-1925), arrived in Madrid during the 1882-1883 academic year as private tutor to the son of the British Ambassador, Robert Morier. Giner was looking for an English teacher for his school and thus employed him. Over the following years it would be Henbest Capper who established the strategy behind some of the reforms that were undertaken, particularly in the area of physical education. See *Stuart Henbest Capper*, «BILE», vol. XLIX, n. 784, 1925, pp. 217-218.

Cambridge, and Miss Emily Davies (1830-1921), founder of the Kensington Society in 1866 and of Girton College in 1869. They also listened to John Sparkes, director of the National Art Training School in South Kensington, an institution that combined teaching in drawing with technical education. However, the individual who most impressed them was undoubtedly Lyulph Stanley (1839-1925)²² who was responsible for the part of the Conference devoted to teacher training and who would subsequently become the ILE's principal interlocutor for British education²³.

On 18 July 1886, Cossío, accompanied by Francisco Giner and other professors²⁴, embarked on a trip that took them to Paris where there was considerable upheaval in the educational world in the light of both Jules Ferry's departure from the government the previous year and the preparations for the new law that would finally be passed on 30 October that year, which completely secularised primary education while moral and civic instruction replaced religious education. Cossío and Giner then continued on to Belgium, Holland and England with the aim of studying the organisation of teaching in those countries. There are few surviving references to this trip, during which they did not leave hand-written or published accounts, in contrast to the previous ones. However, it undoubtedly served to strengthen their ties with some of the educationalists whom they had already met, such as Buisson, Sluys and Stanley and was also the starting point for their friendship with the Portuguese politician Bernardino Machado, who was attending an international gathering of educationalists for the first time.

On 12 August 1888, Cossío arrived in Zurich in order to participate in the International Conference on School Holiday Camps, while the following year he once again visited Paris, Brussels and London, again in the company of Giner. This was a particularly important moment as the celebration of the centenary of the French Revolution had brought to Paris an extremely distinguished group of educationalists from around the world in order to take part in the Congrès International de l'Enseignement primaire, held between 11 and 16 August. Giner and Agustín Sardá gave lectures, but Cossío seems not to have done so²⁵. Cossío and Giner established new friendships during

²² Better known as Lord Sheffield from 1909. On his intellectual activity, see A. W. Jones, *Lyulph Stanley. A study in Educational Politics*, Waterloo-Ontario, Wilfrid Laurier University Press, 1979.

²³ On the connections between Stanley and ILE, see E. Otero Urtaza, *La amistad de Lyulph Stanley con Francisco Giner de los Ríos. Rescate de una relación pedagógica poco conocida*, in M.C. Colmenar Orzaes, T. Rabazas Romero (coord.), *Memoria de la educación. El legado pedagógico de Julio Ruiz Berrio*, Madrid, Biblioteca Nueva, 2015, pp. 195-214.

²⁴ The other new professors were: Agustín Sardá Llavería (1836-1913), Teacher at the Escuela Normal de Maestros in Madrid. Adolfo Álvarez-Buylla (1850-1927), Senior Professor in Political Economy and Public Finances. Adolfo González-Posada (1860-1944). Senior Professor of Political Law. Manuel Sales Ferré (1843-1910). Held the first Chair of Sociology at a Spanish university.

²⁵ «El Liberal» (Madrid), 17 August and 16 September 1889.

these sessions, in particular with William Torrey Harris²⁶, who represented the United States. They also met the Argentinean José Benjamín Zubiaur, who would become a member of the first Olympic committee, and renewed their contacts with Pauline Kergomard, who had by now achieved considerable prestige. Also present were Bernardino Machado, whom they had to convince to attend, and Shuzo Aoki, the Japanese diplomat. Cossío had convinced Aoki to donate to the Educational Museum in Madrid the Japanese objects that had been displayed at the Universal Exhibition in Barcelona the previous year.

2. *An extensive network of pedagogical relationships and exchanges*

The trips under discussion here offered Cossío the chance to establish a wide range of relationships with European educationalists who were introducing changes into Primary School education and into professional research of a technical nature. He gathered and recorded ideas on the furnishing and construction of schools and on the application of manual activities, school trips and interactive methods, but also on markedly ideological concepts such as religious education, co-education and schooling for working-class children. However, not every country had the same influence on his pedagogical ideals. It is clear that Krause's methods constituted the primary axis for his approach to educational reform in general, but we need to distinguish between German and Belgian influences. In addition, a distinction has to be made within German culture of what Krause signified and how his ideas were disseminated in Spain through his educational facet, namely the Froebelian method. This is because while Krause had a direct influence on a small number of countries, the importance of Froebelian theory was universal. Krause's approach had had a notable impact in Spain in the years before the foundation of the ILE, while Leonhardi's religious ideas were influencing the genesis of its small Primary school, which set out to offer itself as a model for the entire Spanish educational system and one that was opposed to the heavy hand of Catholic catechismal doctrine, the presence of which continued to be fundamental in school practices and in the education of all children and adolescents.

Despite the fact that the influence of Krause was particularly significant via Ahrens, in Belgium the intellectual body that would have most impact on the ILE's pedagogical methods was the Ligue de l'Enseignement, founded by Charles Buls and Auguste Couvrier, the same individuals who were behind the establishment of the École Modèle in 1875. It was the latter institution that Giner had taken

²⁶ On the similarities and differences between the thought of Harris and the pedagogy of the ILE, see E. Otero Urtaza, *Educación, Arte y Naturaleza en William T. Harris y Manuel B. Cossío*, «Historia y Memoria de la Educación», n. 5, 2017, pp. 15-42.

as the model for the foundation of the ILE Primary School in 1878, just as a few years earlier he had looked to the Free University in Brussels when attempting to found an alternative university. With regard to France, he was less interested in French pedagogical theory than in the organisation of the State school system in that country and in the reforms implemented under the 3rd Republic. These years saw the existence of a remarkable group of educationalists determined to establish an educational system free of any religious involvement, which attracted Cossío's attention and he would remain in contact with these individuals in future years. The present author has previously referred to a note by Cossío in which he expresses his positive opinions on some of these educationalists. With regard to Gréard he says that he was «of the old school, updated»; he sees Felix Pécaut as the reference point for moral education and Michel Bréal as the equivalent for «Athenian teaching»; Buisson is the «now restrained and perhaps slightly converted» radical; Guillaume is «the impenitent and the one with the broadest vision»; and Marion is «sentimental, moral, elevated, but not one of the most *juste milieu*»²⁷. Of all these individuals it was probably Buisson whom Cossío most esteemed. He also made contact with Coubertin, who maintained a significant correspondence with him and with Giner, although they never met. Cossío started to meet some of the above in 1880 and 1882, becoming closer to Ferdinand Buisson and James Guillaume in London in 1884, but more particularly after his visits to Paris in 1886 and 1889.

The influence of English-speaking pedagogy on the ILE is not just limited to these trips but is also evident in a complex network of relationships that was built up prior to the Spanish Civil War of 1936 and which continued after it. Herbert Spencer was perhaps the first important English author on pedagogical matters for the ILE educationalists. However, the earliest English influence on the ILE of a broader kind was that of Thomas Arnold via Stuart Henbest Capper. Capper arrived at the ILE's headquarters on the Paseo del Obelisco in Madrid with two items that were previously unknown there: a regulatory football and Thomas Hughes's novel *Tom Brown's Schooldays*, which he had translated for the students. Capper's presence transformed the ILE into the first Spanish school where pupils played football and seemingly the first place where this sport was played in Spain.

Cossío wrote a lengthy and detailed report on his trip to London in 1884. The prevailing Forster Law of 1870 had upheld the State's right to involvement in education and there was a faction at the Conference that called for the centralisation of the organisation and for schools to be run in a more «continental» manner, while another faction was against «broadening the all-embracing role of the State» at the expense of private enterprise. The Forster Law had increased the importance of the Board of Education as a centralising element within education

²⁷ See Otero Urtaza, *Las primeras expediciones de maestros de la Junta para Ampliación de Estudios y sus antecedentes: los viajes de estudio de Cossío entre 1880 y 1889*, cit., p. 54.

but at the same time education continued to be funded through local taxation. Between 1870 and 1884 schools for 300,000 children were founded in London while the number of teachers rose by 6,000. The cost of this service was met with notable opposition by conservative groups who were against the idea of free education²⁸. The figure behind all these reforms was Stanley, who became friends with Cossío during the latter's 1889 Paris trip rather than the one to London in 1884. Stanley, who visited Madrid twice, became the most important figure for Cossío with regard to an understanding of the nature of British education and the new initiatives introduced. Stanley closely resembled Giner with regard to character and educational ideals: «His radicalism and his ceaseless activity were proverbial» Cossío wrote in his obituary, adding: «His work as the administrator of the London Board of Education became exemplary within English civic life»²⁹.

The ILE's links with Portuguese pedagogy were established in the wake of the annual trips that Francisco Giner made to Lisbon from 1878 onwards in order to visit his father, who had moved there after his second marriage. This allowed Giner to meet some of the leading members of the so-called «Generation of 1870», such as Rafael Bordallo Pinheiro (1846-1905), Teófilo Braga (1843-1924), José Duarte Ramalho Ortigão (1836-1915) and João de Andrade Corvo (1824-1890). Giner thus acquired considerable knowledge of the current political debates and cultural climate in Lisbon and formulated his own judgment on how relations between Spain and Portugal should develop. He thus continued to maintain various contacts that had encouraged a certain «Iberian sentiment» and which the appearance of the «Revista Ibérica» in 1861 had encouraged within a context of significant political changes in the two countries. By the time Cossío and Giner met Coelho in 1883 the Iberianist movement had already lost momentum as a political solution. Nonetheless, an exchange of ideas was initiated that gained force three years later with the affinities that Giner encountered in Bernardino Machado, with whom he became on very close terms.

The influence of Italian pedagogy was less visible. Cossío was notably critical of Siciliani's ideas and in Italy he focused more on acquiring a solid foundation in art history, a more personal aspect of his activities and one that reflects his aesthetic sensibility³⁰. With regard to Portugal, Cossío's relations were primarily cultural and with Coelho and Machado he rediscovered a lost shared tradition,

²⁸ *La elección del Comité Escolar de Londres*, «BILE», vol. IX, n. 211, 1885, pp. 343-345.

²⁹ There is a reference to the fact that he made two trips to Spain, but with no further information. See *En memoria de Lord Sheffield. Un gran liberal*, «BILE», vol. XLIX, n. 783, 1925, pp. 171-176.

³⁰ In addition to his status as a key educationalist in Spain, it should be remembered that Cossío was also an excellent critic and art historian. Recently there has been an excellent exhibition in Madrid that recovers its facet as a scholar of El Greco. See A. Delgado, *El arte de saber ver: la Institución Libre de Enseñanza y El Greco*, <http://www.abc.es/plan-b/visitar/abci-arte-saber-institucion-libre-ensenanza-y-greco-201701121802_noticia.html> (last access: 11.02.2017). The catalogue can also be consulted S. Guerrero (ed.), *El arte de saber ver. Manuel B. Cossío, la Institución Libre de Enseñanza y El Greco*, Madrid, Fundación Francisco Giner de los Ríos, 2016.

resulting in their respective analyses of the two country's educational systems with the aim of reflecting on the challenges of the future. From other countries Cossío took specific ideas rather than models. Although not included in the summary box, he was influenced, for example, by Sweden: Cossío became acquainted with the work of Otto Salomon, while almost from its inauguration the Educational Museum in Madrid possessed one hundred examples of manual work sent by the director of the school in Näas. American pedagogy certainly influenced the ILE, particularly with regard to its ideas on Secondary school education, albeit not at the period when Cossío began to be familiar with the American ideal of the State school and to receive the committee reports that Harris started to send him³¹. In contrast to other members of the ILE, Cossío barely established links with South American pedagogy and examples of this contact, such as the one referred to in this article, are scarce.

It cannot be said that the ILE depended on a single manner of understanding education, nor that it used closed solutions already applied elsewhere. Rather, Cossío's aim was to gather together from each country the elements that he could use to construct his own discourse, and when he did not agree with them he expressed his differences. In his correspondence with Sluys he reveals a body of shared interests, giving rise to discussions in which reciprocal influences are on occasions evident although we can also detect a number of differences, perhaps more as a consequence of the particular characteristics of the schools that they headed than any theoretical differences. Sluys, for example, was in favour of Ling's gymnasiums, as a result of which the playground of the *École Modèle* became a PE hall every week, while Giner had decided that English team sports and time spent outdoors were not only activities that provided essential physical education but also moulded the children's characters and moral outlook. The relationships between the ILE members and the leading French educationalists became a permanent one from the time that Rafael Torres Campos³² visited the Universal Exhibition in Paris in 1878 when he presented the concept of school trips based on the «*École Monge*». However, for Cossío the way these activities were carried out at the famous French school seemed insufficiently educational, as he had already noted in Brussels in 1880.

Something similar could be said of English education, for which Cossío felt enormous admiration but nonetheless considered too anarchic by nature. It surprised him that it was not considered a public service and that there was no central budget or organising body. «Everyone does what he wants» he stated with enormous surprise in his hand-written notes, adding further on: «The Englishman,

³¹ That same year Harris became Commissioner of the Bureau of Education in Washington, a position he occupied until 1905. Cossío regularly received the Bureau's *Annual Report* and that same year, 1889, sent Harris a report that included a general description of the Spanish education system, which was immediately published.

³² See J.A. Rodríguez Esteban, *Rafael Torres Campos (1853-1904). Geografía educadora y educación geográfica*, «*Ería*», n. 16, 1988, pp. 131-148.

logically stupid but instinctively wise». He valued the spontaneity and initiative applied to the country's educational system, and above all its moral aspirations and the importance that it placed on character training. However, with regard to organisational aspects and the idea of public education founded on a State body of teachers and on the spread of education as a universal right and a reflection of the spirit of a country's citizens³³, Cossío looked more towards the project that was starting to be constructed in France following the implementation of the Ferry laws.

Despite this, he returned from London notably impressed by Ruskin's pedagogical theories. While there are no references to indicate that they met at first hand, Cossío made contacts with representatives of the «Art for Schools Association» and the «Committee of the Manchester Art Museum». Ruskin's pedagogical theories attracted Cossío's attention, both for the practical nature of their applications to schools and because they proposed a type of learning that was against «results» of the «grind and cram» type, which was nothing more than «the teacher's ability to measure everything against a cast-iron rule». Like Ruskin, Cossío believed that the most important aspect was daily work, seen as an interesting occupation and one in harmony with the spirit, given that it developed moral qualities which man could not achieve simply by acquiring culture but only when «he was happy, active, beneficial and useful to the world», for which reason «millions of peasants are better educated today than many who call themselves gentlemen»³⁴.

Numerous other examples reveal the enormous intellectual openness that characterised these key figures and the reciprocal esteem that they professed for each other. When Cossío arrived in Berlin in 1882 and interviewed Henriette Breymann he was astonished by her admission that it was Germany that had to learn from Spain due to the ILE's interpretation of Fröbel's ideas³⁵. In 1888 he read out a report in Zurich on the first Spanish holiday camp that he had led the year before, basing himself on the instructions that he had received from Edmond Cottinet³⁶. After Cossío presented his experiences to the participants at the conference, Cottinet himself stood up to say that the report was the «most forceful» of any given at the conference, and that while it was based on his instructions, Cossío had returned them «with true interest»³⁷. Cossío can

³³ See J.M. Fernández Soria, *Fundar la ciudadanía, formar al hombre, construir la democracia. Europa como solución para las escuelas de España*, «Revista de Educación», Madrid, Número extraordinario 2007, *Reformas e innovaciones educativas (España, 1907-1939) En el centenario de la JAE*, pp. 243-247.

³⁴ *Ruskin como educador*, «BILE», vol. XXIV, n. 481, 1900, pp. 98.

³⁵ See in M.B. Cossío, *El maestro, la escuela, el material de enseñanza y otros escritos*, Madrid, Biblioteca Nueva, 2007, pp. 111-119. Letter from Cossío to Giner dated 16 September 1882.

³⁶ Edmond Cottinet (1824-1895). Playwright and poet. In 1883 he established the first school holiday camps in France. See E.M. Cottinet, *Les colonies de vacances de la ville de Paris*, Paris, Ch. Delagrave, 1888.

³⁷ According to the account by Agustín Sardá in [no author], *Las colonias escolares de*

thus be said to make use of influences from a variety of sources and of different types, depending on the specific characteristics of each country or speaker but brought together in a manner that was quite contrary to the *compelle intrare* and which, according to Gabriel Compayré's analysis of 1886, was defined by its «independence of spirit and liberalism of its tendencies»³⁸.

Some conclusions

The trips discussed above gave rise to a range of interconnections, sometimes of a notably subtle nature, which allow for an explanation of the ILE from a European perspective. A more detailed study is required of Cossío's relations with educationalists from other countries, as well as an examination of the reaction to his achievements within the context of an intellectual educational movement of a secular nature that was growing on a world-wide scale at this period, as such a study would assist in an understanding of the ILE's project to reform Spanish society. During the years in question Cossío compiled a wealth of information that allowed him to be familiar with the principal pedagogical debates that were ongoing in Europe, with the significance and reach of the Froebelian movement, with the repercussion (in terms of acceptance or rejection) of the secular educational reforms in France and Belgium, and with new educational trends, particularly the importance being placed on manual activities, the introduction of which into schools had brought about a change in teachers' methods and approaches.

Cossío stayed in contact with some of these educators for many years. The correspondence that he maintained with Ferdinand Buisson, James Guillaume, Alexis Sluys, Bernardino Machado and Lyulph Stanley lasted almost to the end of their lives. This exchange of opinions encompassed historical events of the importance of the Dreyfuss affair, the execution by firing squad of Ferrer Guardia, the proclamation of the Republic in Portugal, and the Dwelshauvers issue that marked the transition from Krausism to positivism at the Free University in Brussels. Cossío's contacts with other figures such as Pierre de Coubertin were less frequent but they nonetheless reveal his desire to involve Giner in his monumental projects, albeit without success. The information that Cossío amassed during these years provided him with a solid background and in 1904 he was appointed to the first university Chair of Pedagogy created in Spain without the need to formally compete for the position or be examined, given that it was universally agreed that he was the most appropriate candidate for the

vacaciones en el congreso de higiene, «La Escuela Moderna», vol. VIII, n. 86, May 1898, p. 346.

³⁸ G. Compayré, *Mouvement Pédagogique en Espagne. L'Institute Libre de l'Enseignement de Madrid*, «Revue Pédagogique», vol. VIII, n. 7, 1886, p. 13.

post. This Chair allowed Cossío to build up a corpus of knowledge on pedagogy around the world at this period. Although he never wrote up this information he is known for his numerous unpublished texts and for the notes taken by some of his followers³⁹.

Summary Box

| Some of the educationalists and intellectuals whom Cossío met during his European trips between 1879 and 1889 | |
|---|--|
| Countries and people | Explanatory notes |
| <i>Argentina</i> José B. Zubiaur (1856-1921) | As a result of their meeting in Paris, Zubiaur wrote a lengthy article for the <i>BILE</i> on Primary school teaching in Argentina. |
| <i>Austria</i> Friedrich Dittes (1829-1896) | In addition to Dittes, in Vienna Cossío visited the brothers Ivan and C. Selver, Froebelian teachers of whom no more is known. |
| <i>Belgium</i> Guillaume Tiberghien (1819-1901) Pierre Tempels (1825-1923) Auguste Couvreur (1827-1894) Charles Buls (1837-1914) Alexis Sluys (1849-1936) | The École Modèle in Brussels, directed by Sluys, was the model adopted by the ILE for its own Primary school, which opened in 1878. Tempels and Buls were members of the «Ligue de l'Enseignement», which was in turn closely linked to the Free University in Brussels, an institution clearly influenced at this period by Krause. |
| <i>Denmark</i> Adolf Clauson-Kaas (1826-1904) | Cossío met Clauson-Kaas in Dresden on 10 September 1882. They did not get along particularly well and Cossío complained of the latter's money-oriented attitude. |
| <i>France</i> Gustave Salicis (1818-1889) Edmond Cottinet (1824-1895) Felix Pécáut (1828-1898) Octave Gréard (1828-1904) Michel Bréal (1832-1915) Bonaventure Berger (1841-1906) Ferdinand Buisson (1841-1932) Gabriel Compayré (1843-1913) James Guillaume (1844-1916) Henri Marion (1846-1896) Pierre de Coubertin (1863-1937) | Paris was the departure point for Cossío's other European trips. From 1880 onwards and during the course of these various trips he gradually came to know the leading figures behind the educational reforms taking place under the 3 rd Republic. Salicis was one of the first French educationalists to receive him in 1882. He did not meet Coubertin personally but corresponded with him. Cossío also visited René Leblanc, at that date director of the École Normale du travail manuel in Paris, and Bagnaux, whom he considered one of the individuals «at the head of the movement» and as important as Buisson, Gréard and Pécáut. In 1886 Compayré wrote an important article on the ILE in the « <i>Revue Pédagogique</i> ». Also he knew to Edmond Groult in the Congress of Brussels in 1880. |

³⁹ See E. Otero Urtaza, *La irrupción de la pedagogía en la universidad española: Manuel Bartolomé Cossío en la cátedra de Pedagogía superior*, «*Revista de Educación*», n. 332, 2003, pp. 249-263.

| | |
|--|--|
| <i>Germany</i> Theodor Vischer (1807-1887) Henriette Breymann (1827-1899) Augusto Wünsche (1838-1913) Paul Hohlfeld (1840-1910) | In Brussels in 1880 Cossío met Adele von Portugall (1818-1910) and Lina Schneider (1831-1909). During his trip of 1882 he met Karl Lamprecht (1856-1915) and mentions various local teachers such as Hueber, H. Kunath and Lansky. In Berlin, he interviewed Adolf A. Baginsky (1843-1918). |
| <i>Italy</i> Julia Salis Schwabe (1819-1896) Jacobo Moleschott (1822-1893) Adolfo Pick (1825-1894) Pietro Siciliani (1835-1885) Thomas Davidson (1840-1900) Giovanni Bovio (1841-1903) | This section should include Julia Salis Schwabe and Davidson as Cossío met them on his trip to Italy in 1880. At the home of the Castellani family in Rome he coincided with the historian and art collector Charles Drury Fortnum and his wife Fanny Matilda Keats. Also present at these gatherings was Terencio Mamiani (1799-1885). In Bologna Cossío met the poet Giosuè Carducci (1835-1907) with whom he shared several literary soirées. |
| <i>Japan</i> Shuzo Aoki (1844-1914) | During his trip to London in 1884, Cossío also met Fejima, director of the Educational Museum in Tokyo. |
| <i>Portugal</i> Adolfo Coelho (1847-1919) Bernardino Machado (1851-1944) | Cossío met a large number of Portuguese intellectuals, becoming closest to Coelho and Machado. He had also been friends since youth with the musician Alexandre Rey Colaço (1854-1928). |
| <i>Switzerland</i> Heinrich Morf (1818-1899) Emanuel Luthi (1846-1924) | Among the Swiss educationalists that Cossío met he refers to Köller, director of the Educational Museum in Zurich. He visited him in 1880 and 1882. |
| <i>United Kingdom</i> Benjamin Jowett (1817-1893) John Tyndall (1820-1893) Sarah Emily Davies (1830-1921) Lyulph Stanley (1839-1925) | Cossío's relations with British educationalists cannot be understood without the support that he received from Stewart Henbest Capper in 1884, who introduced him into these circles in London. He also greatly admired John Sparkes (1833-1907), director of the «Lambeth School of Art». |
| <i>United States</i> James Russell Lowell (1819-1891) William T. Harris (1835-1909) | Cossío's meeting with Harris in 1889 is important for a knowledge of how the ILE's relationship with leading US educators subsequently developed, particularly from 1898 onwards. |

The attached box allows for a rapid synthesis of the manner in which, over the course of ten years, Cossío established an entire network of relationships that were essential for the modernisation of Spanish education at the start of the 20th century. At this date, Spain did not have a defined educational model nor was it the source of any major pedagogical theories. Leaving aside the religious dogmatism that was offering serious resistance to reform, it was thus extremely open to influences from other countries⁴⁰. While in general it is considered that up to the outbreak of the Spanish Civil War, the educational models to which Spain looked were the French, German and English, in the case of the ILE the Belgian model was extremely important. This was not because it offered Cossío a significant body of ideas that could be applied, but rather because he

⁴⁰ J.M. Fernández Soria, *Influencias nacionales europeas en la política educativa española*, «Historia de la Educación», n. 24, 2005, p. 40.

perceived that serious clashes made the concept of establishing dialogue with opposing positions impossible, as a result of which he never proposed radical measures in the manner of the liberal party in Belgium between 1878 and 1884⁴¹.

The influence of this extensive network of relationships on Cossío's educational thinking is also ambiguous. He did not accept, for example, that a school's neutral position implied an indifference to or neglect of religious sentiments. Rather, he wished to establish the school as a space for free thinking and as such believed that religious education could not be tied to any specific confession, while nonetheless considering it essential for young people to have a reflective type of religious education that was not specifically linked to any particular creed. While Cossío's influence in Spain was remarkable to the point where he was treated as a «secular saint», he did not present himself as an innovator, saying that he had merely limited himself to gathering together ideas that he encountered in other countries.

This was undoubtedly the case, but Cossío's activities were undertaken with a feeling for pedagogy that made the small Primary school that he directed an exceptional place. On the celebrations of the 50th anniversary of its foundation in 1926, a Madrid newspaper stated that it had anticipated the New School educational movement, at that time spreading across Europe, by fifty years. One of Cossío's followers, Luis Santullano, pointed out that one of the school's most unique characteristics was the close relationship he established between teachers and pupils, an approach that became influential throughout Europe, particularly in Belgium after Cossío's speech there in 1880⁴². Joaquín Xirau, another of Cossío's most significant followers, recalled that the latter's programme proposed reforms that were both prudent and daring, constituting «one of the most revealing educational experiments anywhere in the world»⁴³.

⁴¹ One of the principal lessons that Cossío derived from his frequent trips to Brussels was his rejection of the educational reform that Pierre van Humbéeck had promoted in 1879, which established the completely non-religious nature of education. During his visits to Brussels in 1880, 1882, 1884 and 1886, Cossío noted how differences of opinion between conservatives and liberals had resulted in tension and malaise among the population and how the Jacobs Law introduced by the conservative party completely destroyed the liberal reforms from 1884 onwards. The leaflet that Cossío published in Spain on this ideological battle offers an analysis of a notably prudent type in which he set out his concept of how an educational reform should be undertaken; never imposed in a hasty, coercive manner as this would create obstacles «and difficulties for a progressive implementation of ideals», giving rise to «hatred and enmities where otherwise sympathy and support might have been encountered». See *Situación de la Instrucción Pública en Bélgica*, originally published «BILE», vol. IX, 1885, n. 190, pp. 14-16, n. 192, pp. 45-47 and n. 194, pp. 70-73. One year later a more reflective version was published as a leaflet by M. Burgase in Madrid.

⁴² L. Santullano, *Cincuenta años después. Un programa de educación pública*, «BILE», vol. LI, n. 802, 1927, pp. 26-27.

⁴³ J. Xirau, *Manuel Bartolomé Cossío y la educación en España*, México, El Colegio de México, 1945, p. 43.

The enthusiasm with which the school trips were organised, the importance placed on aesthetic emotions and an almost religious love of nature were also highly distinctive characteristics that are difficult to find in other celebrated schools of this period. What then, was original about the ILE's activities in contrast to these other institutions? Possibly the genuine spirit with which every task was undertaken, with no room left for routine, or, as Pablo de Andrés, a third follower of Cossío's indicated, because educational activity achieves its maximum glory when it is beautiful, as «without a sense of beauty there is no room for educating, merely instructing». It is in this respect, in knowing how to develop sentiments and emotions and in taking delight in beauty, that the ILE is unique. «No one associated with the ILE would exchange a moment of artistic emotion for any other pleasure, nor fail to experience emotion where it can be experienced»⁴⁴.

While Cossío subsequently made other trips around Europe and even visited the USA in 1904, the roots of the educational reforms that he promoted in Spain are concentrated within this decade. After the founding of the Museo Pedagógico in 1882, which was the principal centre for the dissemination of the new educational ideas, the creation of the Committee for Further Studies [Junta para Ampliación de Estudios] in 1907 meant that many professors and teachers were publicly funded to visit other countries. They did not depart at random, given that the network that Cossío had established allowed them to prepare these trips in a detailed manner beforehand and he himself was generally informed about each one, giving advice to those about to depart. However, at the same time the contacts that these travellers began to establish with 20th-century European educational trends extended far beyond the circles of the ILE, bringing successive new waves of ideas (Decroly, Montessori, Piaget and Freinet, among others) that became part of the general cultural bedrock of «Institutionism» and resulted in the emergence of new generations of teachers that would eventually a powerful educational movement into being, albeit one wiped out after the Spanish Civil War by the repression of the Franco regime with its intention of restoring a «national culture»⁴⁵.

This was a movement that included leading international figures such as Lorenzo Luzuriaga and Pedro Roselló and which also involved a group of professionals who transmitted both the environment of the Museo Pedagógico and the «Revista de Pedagogía», founded by Luzuriaga in 1922, to the leading thinkers of the New School, while also introducing the idea of *Einheitschule*, which would have an extremely important influence on the educational reform

⁴⁴ *Maestros*. D. Manuel B. Cossío, «Escuelas de España», vol. II, 1929, pp. 104-105. Although the text is not signed it seems highly likely that it was by Pablo de Andrés Cobos.

⁴⁵ From the time of its foundation in 1876, the ILE had been accused by the Catholic Church and by the more conservative political circles of pursuing a project to «de-Christianise Spain». Members were frequently accused of «Protestantism» and of wishing to introduce «pro-foreign tendencies» into the country.

of 1931. By the start of the third decade of the 20th century, the ILE had established a fully defined model of education that was connected with a broad international network, the construction of which had begun with Cossío's trips forty years before.

Exactness and Czech pedagogy at the break of the 19th and 20th Century*

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ABSTRACT: The text deals with the topic Forming Pedagogy as a Science and the Problem of Exact Cognition in the Pedagogic Science within the debate at the turn of the 19th century. It serves as an example of forming Pedagogy in a «non-German» way. In the Czech countries of the Habsburg Monarchy, the development of Pedagogy at the end of the 19th century is represented by one educational centre – Karl-Ferdinand-University in Prague. The University was divided in 1882 and the developing Czech and German pedagogic scientific discussion acquired independent departments and independent professoriates. As mentioned previously, the concept of Pedagogy as Science in the Czech professoriate at the Czech Karl-Ferdinand-University was formulated and formed differently when compared to the German professorship at the German Karl-Ferdinand-University. The work of Czech professors had, amongst others things, the desire to create a «national pedagogic science», to overcome the German concept of Pedagogy which had strongly been influenced by the idealistic teachings by J.F. Herbart or J. F. Hegel and in case of Otto Wilmann (1839-1920) based on Catholic religion. Since 1882, Czech pedagogic discussion struggled to release itself from the influence of the teachings by J.F. Herbart and Herbartism which reached its peak in Prague between 1865-1885. This approach is present in works and lectures by Josef Exner, Augustin Smetana, František Čupr, Josef Dastich and partly also Josef Durdík, who was deeply inspired by Darwin's theory. The interpretation during this period inclined much more to the findings of Herbert Spencer (1820-1903), August Comte (1798-1857) but it also leaned on the evolutionism of Ch. Darwin (1809-1882). All this becomes evident mainly in the late work by the first Pedagogy professor at the Czech University – Gustav Adolf

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Lindner (1828-1887). Activities of significant outstanding personalities within the teachers' community were also of a great importance, e.g. Josef Ulehla (1852-1933). It was exactly these «progressive» teachers who translated works by H. Spencer. They actually enabled the experts and the broader teaching public to penetrate the grounds of the positivistic thinking in the pedagogic discussion. The article devotes attention to the «break time», when the Czech pedagogic discussion strongly absorbed positivistic and evolutionistic attitudes and we ask, if it was a specialy «Czech way» of forming Pedagogy, or if it was a generally way for the pedagogical discussion, to be free from «German pedagogical power».

EET/TEE KEYWORDS: Herbartism; New school; Habsburg Monarchy; Czech pedagogical science; Evolutionism; Positivism; XIX-XXth Centuries.

Introduction

The establishment of pedagogy as a science took place in the Central European territory predominantly in the last third of the 19th century. In the Habsburg monarchy, it was primarily a university workplace in Vienna and Prague. The following analysis focuses on the development of a pedagogical discussion at Charles-Ferdinand University in Prague during the last third of the 19th century. The specific development of the university – the division of the university institution into the Czech and German part in 1882 (the consequence of the Czech-German national and cultural rivalry and the result of the efforts of the Czech national movement for the «Czech science») enables us to follow the formation and structuring of two nationally different traditions of pedagogical thinking, i.e. Czech and German, or rather the Austrian thinking, within a single university institution and within a clearly defined cultural-geographic «territory». By 1882, lectures on pedagogy were only delivered in the German language at the University of Prague and their content definition was under the strong influence of the teachings of Johann Friedrich Herbart (1776-1841), later mainly under the so called, Herbartism. After 1882, the possibility of self-development of Czech and German pedagogy was given and we witnessed a very different direction of the pedagogical debate in both «national camps». While the German pedagogical discussion continued to be under the strong influence of the teachings of J.F. Herbart and under the influence of Catholic pedagogy (Professor Otto Willmann), Czech pedagogical science sought its «emancipatory resources» both under the influence of Charles Darwin's evolutionism and under the inspiration of the ideas of positivism by Herbert Spencer (especially, professor Gustav Adolf Lindner). The concept of development became dominant in the Czech pedagogical debate and influenced the overall layout of pedagogy as a science, particularly, the view on conditions and processes of education that were viewed by the optics of laws of development.

Laws and rules should be, similarly to evolutionism, a firm support of the scientifically underpinned process of education and training. Even though

«scientific pedagogy» continued to see the main goal in the upbringing of a good and a moral person (a beautiful and a good man), the laws of development theory and overall positivistic grasp of science determined the view of achieving these goals as well as the scientific layout of the Czech pedagogical science. Although pedagogy was closely connected with the aesthetics or philosophy during the second half of the 19th century, the scientific grasp of pedagogy in the Czech environment was based on the assumptions of evolutionary theory and, later, scientific procedures in the natural sciences.

The following analysis asks how the Czech pedagogical tradition could find a «path of its own» from the dominant influence of the Herbart model, initially enabling the foundation of «scientific pedagogy» in the Czech Lands, but later hindered its own free development of pedagogical discussion. In the framework of history of ideas¹ and intellectual history, it is important to try to reconstruct the view of Czech pedagogical thinking of the second half of the 19th century on the basis of pedagogical science. It is also necessary to contextualize it within the discussion regarding the nature of science as well as to point out its differences and conditions in the contrast with the German debate that was also an essential part of the scientific pedagogical tradition of the multinational Czech Lands in the Habsburg Monarchy. We inquire what had been found in the Czech pedagogical discussion as well as considered as obvious or enforced. Moreover, we inquire about intentions that selected works may have fulfilled in their pedagogical thinking. Last but not least, there is an important question whether the «Czech way» was typical only for the Czech pedagogical community, whether we find similar tendencies and a similar structure of a pedagogical discussion also in other countries and educational communities in the Central and Southeast Europe. It is significant to point out diversity of the European pedagogical debate of the given period, which is sometimes simplified with a good intention to make it more transparent or to systematize its development. However, we foist the pedagogical discussion within the historical and pedagogical framework, rather representing results of the later development of history of pedagogy than the real discourse of the time.

Following ways of adopting origins of ideas concerning evolutionism and positivism in Czech pedagogy, we can use professional works on cultural transfer issues. As can be seen from this, scientific and cultural transfer is largely subjected to the rules of reading «transmitted information» and mental-cultural patterns on the «receiving side»², as well as questions of the personal

¹ Q. Skinner, *Visionen des Politischen*, Frankfurt am Main, Suhrkamp, 2009, pp. 7-93, and M. Erben, *Begriffswandel als Sprachhandlung: der Beitrag Quentin Skinners zur Methodologie und Funktionsbestimmung der pädagogischen Geschichtsschreibung*, Frankfurt am Main, Lang Verlag, 2013.

² P. Bourdieu, *The rules of art: genesis and structure of the literary field*, Stanford, Stanford University Press, 1996, and Id., *Science of science and reflexivity*, Chicago, University of Chicago Press, 2004.

and social integrity and identity of the persons and communities that receive the «information»³. These are always very specific cases of the formation of one's own intellectual or cultural tradition, based on common starting points, but nevertheless acquiring specific patterns and forms⁴. Continuity and discontinuity of scientific thinking mingle and create a distinct dynamic process of a «transfer». Similarly, the development of Czech pedagogy as a science can be observed in this sense. Even its roots can be considered «typically» Central European⁵ and based on German tradition of philanthropy and Herbartism⁶. However, as its further development shows, the Czech pedagogical community did not have enough of these scientific frameworks to affect the multi-layered pedagogical practice and opened up to the influences of positivistic, later experimental pedagogies and currents based on quantitative approaches. As a result, the development of the «Czech pedagogical science» deflects from development of the German pedagogical debate cultivated in the Czech lands of the Habsburg Monarchy. Not only Prague University, but also Czech Lands are such an example where there are coexisting and developing very different discourses side by side that really differentiate corresponding with «national boundaries». However, the present study is limited to the «break-through» period when the Czech pedagogical discussion overcomes tradition of Herbart's teachings, rejects the influence of the Catholic Church and its teachings in the field of pedagogical thinking while intensively absorbing ideas of positivism and evolutionism. We focus on the latter G.A. Lindner's work (1828-1887), pedagogical lectures by Josef Durdík (1837-1902)⁷ and his brother Petr Durdík (1845-1909)⁸ promoting the aesthetics and pedagogy of the nature of natural sciences. The further attention is also paid to the translator H. Spencer (1820-

³ A. Giddens, *Modernity and self-identity: self and society in the late modern age*, Cambridge, Polity Press in association with Basil Blackwell, 1991.

⁴ Ch. Mayer, *Female education and the culture transfer of pedagogical knowledge in the eighteenth century*, «Paedagogica Historica», vol. 48, n. 4, 2011, pp. 511-526.

⁵ T.Kasper, D.Kasperová, *National, state and civic education in the Czech lands of the Austro-Hungarian Empire, and, after 1918, in Czechoslovakia*, «History of Education & Children's Literature», vol. 10, n. 1, 2015, pp. 251-278, and I. Tretera, *J. F. Herbart and His Supporters at University of Prague*, Prague, Charles's University, 1989.

⁶ Reception of Herbart's work and pedagogical system reached its peak development between 1865-1885 in Prague. These were lectures by Joseph Exner, Augustin Smetana, František Čupr, Josefa Dastich and partially Joseph Durdík.

⁷ J. Durdík was giving lectures on pedagogy from 1888 till 1899 after G. A. Lindner. His major was aesthetics, though. J. Durdík's work overlapping pedagogy: J. Durdík, *About Herbart's Teachings Values Concerning Mainly Czech Circumstances*, Prague, Grégr-Dattel, 1878; Id., *About Relationship of Pedagogy to Other Sciences*, Prague, J. Otto, 1898; Id., *Psychology for School*, Prague, T. Mourek, 1872; Id., *Fresher History of Philosophy 1st and 2nd Volume*, Prague, J. Otto, 1887.

⁸ Pedagogical studies of Petr Durdík: Id., *Pedagogy for Czech Schools Generally, for Secondary Schools Particularly*, Prague, Fr. A. Urbánek, 1887, and Id., *About Foundations Regarding Morality*, Prague, Heritage of Comenius, 1893, and Id., *Rousseau and Pestalozzi in Their Relations to Comenius*, Prague, Fr. A. Urbánek, 1888.

1903) and supporters of the theory of Ch. Darwin's (1809-1882) development as well as the teacher of the city school J. Úlehla (1852-1933), who did not only influence Czech pedagogy but also deeply affected Czech teaching community.

1. *The Idea of Evolution and a Pedagogical Discussion at Prague University*

A remarkable encounter with Ch. Darwin's theory and with the ideas of evolution is recorded by Professor of Philosophy at Prague University, Joseph Durdík⁹. If we read his works and university lectures, we find that he largely cope with the heritage of J. F. Herbart's teachings, accepts his theory of ideas, but deviates from Herbart's metaphysics. In particular, in the work *On the Significance of Herbart's Teaching, Especially Concerning Czech Circumstances* (1878), but also in the work *On the Relation of Pedagogy to Other Sciences* (1898), J. Durdík shows the importance of Herbart's teachings and the importance attributed to the natural sciences in thinking about the pure essence of aesthetics and pedagogy. Durdík defines the task of science as «collecting, organizing, classifying and describing»¹⁰ the world of nature and spirit, but also «enforcing the laws by which [sciences, T.K.; D.K.] administer»¹¹. Durdík points out, it is essential to follow psychological laws in pedagogy. The goal of pedagogical endeavor is normative: «Normative shows goals to be directed by the educator, patterns to which they are directed, and ideals they are looking for»¹². The educator follows the law of morals and leads trainings in the sense of «doing good»¹³. For our reasoning, there is also remarkable Durdík's article from the year 1874 *About Darwin's Doctrine*, which was published in a comprehensive essay *On the Progress of Natural Sciences*. Durdík shows here what Darwin's doctrine meant for his pedagogical thinking. The notion that the world evolved from a primitive cell or from a few species to its diversity that this evolution progressed gradually to the richness of our natural world, this fact became a determinant for Durdík and applied it to the cultural world. Even cultural phenomena, according to J. Durdík, can be understood as complex «organisms» that have reached their complexity gradually and above all, they can be understood if we determine laws of their development. Thus, the world lost, according to Durdík, the aura of mystery and creation, and began to be interpreted and explained by the doctrine of natural development and struggle – the struggle for survival. The spirit of survival of the stronger can also be found in the application of this law to a «cultural mission» or

⁹ Josef Durdík personally met Ch. Darwin in 1875 in Down during his studies in England.

¹⁰ J. Durdík, *About Relationship of Pedagogy to Other Sciences*, Prague, J. Otto, 1898, p. 7.

¹¹ *Ibid.*

¹² *Ibid.*, p. 11.

¹³ *Ibid.*, p. 12.

the superiority of a more advanced culture over a lower one. Durdík invokes Darwin and his contribution from the book *On the Origin of Species* (1859) showing which laws and processes are subjected to a man that are impossible to escape. However, according to J. Durdík, this does not imply a human being a lower organic beings – especially animals. According to Durdík, Darwin's theory did not mean the end of faith, or the end of law of love and humanity. It was a contribution to the fact that the area of life was explained «soberly» and scientifically by the laws of development. Durdík positively assesses the «end of myths», mythology, and invokes a new period of science and their laws – «positive sciences»:

A man's connection with a monkey leading to materialism is a pure lie. Darwin himself is so little materialist as all men who are truth-faced. Matter is a mystery, so materialism does not explain anything. It would be totally ungrateful to a man to be married to a monkey – this statement is already quite ridiculous; a human being is related with beings even of a lower order¹⁴.

J. Durdík shows here his concept of the importance of Darwin's theory on the origin of species. It is obvious that one should not fear the «revolution» of knowledge and should not lay its foundations on suppositions but always on the evidence that is underpinned by the study of laws of matter: Although with this approach one «loses» astonishment of the world and is «thrown» to never ending explanation process that had been ensured by other than scientific authorities, it does not mean that all human and other actions are governed by the laws of combat and the theory of development. Man is a creature whom is given insight into which areas of culture are determined by the same laws as nature, and vice versa, where these laws do not interfere and «human fellowship» is governed by laws of love and humanity. Durdík thus extends an area that can and should be conceived by science based on laws of development. There was also a considerable part of the teaching practice in this area, laws, which had to be revealed by pedagogy as well as classified and made available to educators. So their actions were not only correct, but also beautiful and good.

Morality was based on the idea of law and progress in the treatise *On Progress of Morality* (1884) by J. Durdík. At the beginning of the treatise shows that morality is not something unchangeable but changeable in terms of age and maturity, maturity and experience, as well as changes in society. Similarly, teachings of manners change with time. However, the question remains whether morality (practical philosophy) can be seen as a general rule rising from over all morals¹⁵. There are certain laws and ideas that, undoubtedly, constitute foundations of morality:

¹⁴ Id., *About Darwin's Doctrine*, in Id., *On the Progress of Natural Sciences*, Prague, 1874, pp. 219-233, here p. 232.

¹⁵ Id., *On Progress of Morality*, Prague, J. Otta, 1884, p. 11.

In mathematics, there are principles, where we can basically find similar sentences like in morality – or there are absolutely no morals. So we come to basic sentences, which never change, insist on the same phenomena and truth that do not suffer from unbeatable attacks of doubt¹⁶.

Durdík, therefore, cannot revitalize morals, and cannot see the subjective phenomenon in morality but he finds the fundamental laws in basic moral laws and makes it so recognizable to reveal these laws and unchanging truths. With his ethics, he weakens the order of the tradition and undermines morality legitimized from other levels than from scientific knowledge based on laws of morality, which do not rely on metaphysics or assumptions but on fixed truths – laws. The result is not an evolutionary view of ethics, but an understanding of ethics as a science where good is known through ethical laws.

Similarly, Peter Durdík¹⁷ views ethics and pedagogical science. The positivist view can be especially seen in his work *On the Fundamentals of Morality* (1893), but also in a three-part textbook entitled *Pedagogy for Czech Schools in General, the Secondary School in Particular* (1882; 1883, 1887). Peter Durdík treats moral behavior in Kant's sense as an action based on following duty and achieving virtue. P. Durdík, however, rejects Kant's categorical imperative as a means of determining duty on the grounds where it is not clear what the categorical imperative depends on and by whom, or what determined is. The goal of a moral conduct should be, according to P. Durdík, only the service and work for goodness of the whole mankind. However, this goodness is not given by metaphysical or higher religious authorities but by an attempt to overcome actions rising from personal benefits of the individual. As Peter Durdík suggests, one must resign to the idea that he would act well if he followed «higher authorities» or another voice than his conscience¹⁸. In this respect, P. Durdík rejects nihilism, spiritualism or materialism, monism and dualism in ethics, and invokes positive ethics based on reasoning. Within this framework, he defines a code of ethics based on what is to be beneficial and good for humans. In reality, however, these are the periodic conceptions of moral and virtuous conduct, which were given as generally valid by P. Durdík.

In academic Pedagogy Petr Durdík defines pedagogical science as «both science and art, acting on a person from a very young age, so that his/her powers and abilities can develop as thoroughly as possible, finally searching for the welfare of people and his/her neighbor»¹⁹. P. Durdík therefore seeks laws and rules of education and teaching that lead to the intellectual, aesthetic and moral

¹⁶ *Ibid.*, p. 13.

¹⁷ Petr Durdík was awarded an associate professor at Prague University. His major was a Secondary Pedagogy that he cultivated as well as was giving lectures on by the end of the 19th century.

¹⁸ *Id.*, *On the Fundamentals of Morality*, Prague, Heritage of Comenius, 1893, p. 66.

¹⁹ *Id.*, *Pedagogy for Czech Schools in General, the Secondary School in Particular*, Prague, Fr. Urbánek, 1883, p. 11.

development of an individual, i.e. to general education. It should be observed, conveyed and experimented in order to reveal laws of education and learning.

2. Pedagogy of G.A. Lindner and Positivism in the Czech Pedagogical Discussion

«Beginning» of the Czech scientific pedagogical discussion can be seen from the year 1882, when the Czech professorship of pedagogy was taken over by G. A. Lindner (1828-1887) at the University of Prague. Lindner was not only familiar with the Czech pedagogical community but also the German and Austrian one, especially thanks to his very sophisticated, widely used pedagogical textbooks, which fulfilled the task of 'standard' professional works in the Habsburg monarchy. These were writings *On General Education* (in German, *Allgemeine Erziehungslehre*, 1877 and *General Schooling* (in German, *Allgemeine Unterrichtslehre*, 1877).

However, the influence of positivist teachings by H. Spencer and educational evolutionism is predominantly evident in Lindner's later work called *Pedagogy, Based on the Doctrine of Natural, Cultural and Moral Development*, issued in 1888, largely summarizing his university lectures at the Czech University of Prague. This work was published one year after the author's death by his pupil Joseph Klika (1857-1906)²⁰.

Now, let us turn to Lindner's last piece and try to point out main ideas demonstrating the openness of Czech pedagogy to Spencer's pedagogy. Like Spencer, Lindner recognizes the importance of scientific pedagogy that is not only based on psychology but also on physiology, sociology and anthropology. In his book *Pedagogy*, Lindner introduces the so-called pedagogical anthropology, which is, in his conception, the so-called pedagogical diaethics, i.e. biology and physiology as well as pedagogical psychology. Lindner therefore builds pedagogy on the patterns of development and intellectual understanding and excludes any speculation. Pedagogy should be based on the doctrine of natural, cultural and moral development, which is even evident from the title of his work. According to Lindner, Pedagogy is subjected to physiological, psychological, social, in other words, on cultural and moral laws. Lindner invokes both Ch. Darwin's natural development and H. Spencer. He also invokes A. Comte in cultural and moral development, as well as J.F. Herbart and J.J. Rousseau. The essence of this development is to study and illuminate pedagogy. For Lindner, philosophical pedagogy, besides practical pedagogy, is theoretical and empirical

²⁰ On Character of J. Klika see more Z. Pokorný, J. Daubner, *Klika Josef (1857-1906)*, Prague, ÚŠI MŠ, 1987.

as well as historical pedagogy²¹. However, as Lindner defines pedagogy, it is not just knowledge of common patterns of development, but also individual traits of human development that take into account personal freedom:

If education was not inclined to the core of the individual, but to the adjacent things, it would not be the education, but pure training, drilling and dressage²².

If education was only a follow-up of development «continuous conversion, progress from grade to grade»²³, the influence of external conditions, the environment and the individual peculiarities of adaptation (accommodation) to these conditions would be negated. In this respect, emphasis is placed on the principle of «inertia», i.e. natural development and the principle of «variability», i.e. individual development²⁴. Lindner speaks about the principle of necessity (education by nature according to Darwin) and freedom (education by culture, societies that set the goal of education). Nature is the realm of what exists coming from causes and culture/society is the realm of what should be coming out of purpose. Lindner, therefore, does not place pedagogy solely on natural development, it shows that the principle of development determines the processes of education both in the field «of nature and societal»²⁵. Lindner, however, does not restrict the social freedom of setting educational goals, and does not condemn it to developmental determinism. The main task of education remains in Herbart's spirit of educating of a moral person. On the other hand, the area of what should be reached, taught is subjected to a moral development. Lindner's moral ideals are conceptualized as the so-called practical ideas

based on conditions of desire accompanied by judgments of absolute passion, or of total dislike. They do not lend this concept only to the will itself but also to the bearer, that is to say, to the personality, to the individual, to the person, where eventually, a total condemnation cannot be avoided. The truth of these ideas, as well as judgments of total pleasure or total displeasure is self-evident, validity irresistible²⁶.

G.A. Lindner and František Krejčí²⁷ later on, they both rely on moral behavior and moral order. Moral ideas²⁸ are recognizable and evident from rational understanding. They are verified by cohabitation in society and

²¹ G.A. Lindner, *Pedagogy on the Bases of Natural, Cultural and Moral Development*, Roudnice nad Labem, Bookstore A. Mareš, 1911, p. 8.

²² *Ibid.*, p. 9.

²³ *Ibid.*, p. 11.

²⁴ *Ibid.*

²⁵ *Ibid.*, p. 21.

²⁶ *Ibid.*, p. 71.

²⁷ It is especially about Krejčí's treatises: F. Krejčí, *Positivism and Upbringing*, Prague, Heritage of Comenius, 1906, and F. Krejčí, *Positive Ethics as Teaching Morals on the Basis of Natural Development*, Prague, J. Laichter, 1922.

²⁸ G.A.Lindner speaks of the idea of conscience – i.e., free conscience, ideas of excellence achieved by education, of prosperity, and finally of the law and justice to be done and held.

generally accepted by moral ideals given as facts, which society accepts or rejects. Therefore, it is not about the «absolute ideas» of goodness, a priori about foundations of social coexistence, but it is about norms that are subjected to changes in time and determined by social territory of moral customs. In this respect, Lindner supports Spencer, who finds an appropriate conduct beneficial. It should not be conducted in an abstract way, but by Rousseau's method of natural consequences concerning the act of a child²⁹. We can say that Lindner shows how education can be based on ethics, but also can rely on evolution and reflect Darwin positively. Considering that we witnessed a strong departure from the Catholic Church and revival of the Czech Reformation tradition at the end of the 19th century and an inclination towards ethical and rational deism, it is obvious that this direction was reflected in the professional pedagogical reasoning. It accepted revealed religious truths very coldly, or not at all, and developed a pedagogical discussion based on «rational religion or natural theology that built morality above devoutness or religious cult»³⁰. Within Czech intellectual groups, this direction represented a barrier against clericalism and atheism on one hand, socialist or scientific materialism on the other one. Education and pedagogical science were an important part of this discussion because the principle of development played a more fundamental role in the Czech pedagogical debate than in the German environment³¹. Czech debate much more abstracts the very concept of the law from evolutionary theory and the processes of education itself is going through it. On the other hand, it is clear that it is inappropriate and impossible to establish ethics providing pedagogical educational goals exclusively on evolutionary laws. Thus, free processes are extricated from metaphysical speculation or dependence on religious dogmas in a Czech pedagogical discussion. They are subjected to the criticism of a reason and are bound to customs of the community and its concept of good and bad or evil, but are not «immanent» laws of goodness or evil ecc. Though German pedagogy later sought answers to the «crisis of modernity» and created many reform-pedagogical concepts of conceiving Darwin's education³², it did not overpass the concept of pedagogy as a science based on empirical research into

²⁹ S. Tomlinson, *From Rousseau to Evolutionism: Herbert Spencer on the Science of Education*, «History of Education», vol. 25, n. 3, 1996, pp. 235-254. Spencer rejects body or other punishments, anger or praise, verbal explanation as an educative method of morality, but in the spirit of Rousseau's calling for the natural consequences of acting for a child. H. Spencer, *Reasonable Raising, Moral, and Physical*, Praha, Rohlíček a Sievers, 1879, pp. 77-79.

³⁰ M. Dokulil, *Masaryk and Religion: Seven Stoppings Concerning 75th Anniversary of TGM's Passing*, Brno, Masaryk University, 2012.

³¹ J. Oelkers, *Wissenschaft und Wirklichkeit: Der pädagogische Diskurs in Deutschland am Ende des 19. Jahrhunderts*, in D. Hoffmann, A. Langewand, Ch. Niemeyer (edd.), *Begründungsformen der Pädagogik in der Moderne*, Weinheim, Deutscher Studien Verlag, pp. 101-124.

³² M.S. Baader, *Erziehung als Erlösung. Transformation des Religiösen in der Reformpädagogik*, Weinheim, München, Juventa, 2005.

developmental patterns in education, as it was happening in a greater measure in the Czech environment³³.

3. *Evolution and Thinking of Czech Teaching Community on the Example of J. Úlehla*

Spencer's treatise *Education: Intellectual, Moral and Physical*, 1861 – that was so much evoking similarity with Lock's essays *On Education* – it was available to Czech readers much earlier than Lindner's «processing» of the ideas of positivism. The file had already been translated by J. Úlehla in the year 1877³⁴. It was after the unknown Moravian teacher was thoroughly acquainted with J.S. Mill's philosophy but also with Ch. Darwin's³⁵ writings. He became a supporter of the so-called real pedagogical empiricism³⁶. In 1895, Úlehla's translation followed of Spencer's multi-part book *The Principles of Ethics*. The pedagogical direction of the pedagogue is indicated in the Translator's Preface to Spencer's *Education*, his pedagogical 'program' in his own writings – especially in the two-part of *Pedagogical Letters* (1899 and 1904) and later in the ten part-papers on the *Study of Human Education*, (1922-27), or in the *Nature of a Human* (1932). Úlehla's reviewer, Emanuel Havelka, shows in his book *Investigations* that Úlehla calls for other auxiliary science regarding pedagogy, besides biology, psychology and sociology – after pedagogical anthropology, i.e.

To study historically and scientifically the evolution of man, his breeds and families, and to understand the lawful development of social services in their connections so that at least with partial safety we can see the mental and physical essence of children we educate and³⁷.

The evolutionary “basis” of Úlehla's *Investigations and Pedagogical Letters* is evident in many places, like his aim, to make use of natural science and ethnography for pedagogy. He refers to inner given facts in the field of human development and use Darwinism also in the sociodarwinist sense. By joining

³³ J. Oelkers. *Reformpädagogik. Eine kritische Dogmengeschichte*, Weinheim, Juventa, 1989, p. 93.

³⁴ Year of translation 1877, Emanuel Havelka presents in his treatise from the year 1933 *On Pedagogical and Social Reforms of Joseph Úlehla*. Jaroslav Kopáč states the year 1879 compared with J. Kopáč, *History of Czech School and Pedagogy from 1867 to 1914*, Brno, UJEP, 1968, p. 86.

³⁵ Úlehla noticed articles on J.S. Mill's Works and Ch. Darwin in the magazine *Public Education* by Professor Joseph Durdík. To treatises of H. Spencer he was brought to attention by the teacher J. Mrazík (1848-1923). Comp. *On Pedagogical and Social Reforms of Joseph Úlehla*, Prague, Heritage of Comenius, 1933, pp. 8-9. On Character of J. Mrazík comp. H. Kříčková, *J. Mrazík (1848-1923)*, Prague, ÚŠI MŠ, 1990.

³⁶ Compared with O. Havelka, *On Pedagogical and Social Reforms of Joseph Úlehla*, Prague, Heritage of Comenius, 1933, p. 7.

³⁷ *Ibid.*, p. 31.

Anglo-Saxon pedagogy, Úlehla also wanted to show an effort to overcome the German modern speculative pedagogy, deriving from a metaphysical and unrealistic basis, from medieval dogmatism³⁸ and apparently puts German pedagogy in the contrast to the Anglo-Saxon pedagogical debate. Úlehla is trying to overcome Herbartism, characterized as one-sided intellectualism leading to memorial learning and passivity. This concept comprised teaching methods with five formal degrees understood as a pedagogical Gospel and, last but not least, imprisoning pupils in the benches in their activities and requiring only obedience and order (Zucht, Gehorsam). Despite the fact that Úlehla came out of Herbartism, he soon opposed him and often criticized him against invoking Anglo-Saxon pedagogical literature, which he finds the only correct basis for Czech pedagogy. In Spencer's spirit – science leads to a beneficial and true knowledge of itself and the world, science brings industrial progress, guarantees dignity to peoples and individuals, science is the foundation of civilization, modern livelihood, machine production and the way out of tradition and superstitions³⁹. Úlehla also urges Czech pedagogy to be based on evolutionary, realistic, empirical, scientific, and positivistic direction. The question does not want to cross the boundaries of recognizable – whether by way of reason or senses. Science should follow the concept of classified knowledge⁴⁰. Even for Úlehla, science should be preceded by observation, experimentation – induction. Science has to serve life and man. Spencer's writings are about «celebration of applied science», and Úlehla is convinced that only inductive science leads to true knowledge. School and learning should be based, as in Spencer's *Education*, on experience, on learning, on pupil's individuality, his/her individual and social development should be respected. Spencer urged the textbooks and books to complement the immediate knowledge of a child. Spencer warned, similarly later to Úlehla, of the dangers of formalism in teaching, which led to learning by heart, misunderstanding problems, and above all, loss of interest in knowing when «the spirit is sacrificed» and a child becomes «the recipient of foreign ideas and not the investigator»⁴¹. The act and acting as a means of learning sounds both at Spencer in his *Education* and at Úlehla. Spencer says that «the greatest power of abilities comes from the performance of those duties that preach needs of life»⁴² and shows that «education, which teaches best to manage oneself, exercises the best of our strength»⁴³. Spencer was an admirer of the Pestalozzi method, even though he was aware that it had not been successful in fulfilling of many reports in individual institutes. Still,

³⁸ *Ibid.*, pp. 13, 22.

³⁹ H. Spencer, *Education: Intellectual, Moral, and Physical*, Prague, Rohlíček a Sievers, 1879, p. 35.

⁴⁰ *Ibid.*, p. 12.

⁴¹ *Ibid.*, p. 21.

⁴² *Ibid.*, p. 32.

⁴³ *Ibid.*

the natural Pestalozzi method was an ideal to which education and teaching should be guided. If the inmate is supposed to achieve physical and mental health, avoiding death, and avoiding learning sickness, then the educator has to know laws of physical, mental and moral development resulting from positive knowledge. This creed is held by Czech Úlehla. Although this teacher did not set up his own scientific school, he helped to set Czech teaching and Czech pedagogy to be interested in «Real positive pedagogical science».

Czech school should build on the significance of observing, induction and importance of scientific stages for pedagogy⁴⁴ (exactitude, quantification of phenomena and their measurability, deduction of pedagogical patterns).

J. Úlehla points out that pedagogy should illustrate scientifically laws of child development and learning so that school can be reformed. As a loud critic of the «old school», he encourages pedagogical research to make «the new school» based on scientific pedagogical laws, not on speculation or tradition. School should strive for knowledge and development of education. According to Úlehla, school only practiced commemorative learning. As a result of the great effort at school, was not pleasure of learning, immersing itself in the richness of science and human culture in all the excitement and uniqueness⁴⁵. The Old School did not fulfill educational efforts, but only aroused fear of science that cut off its astonishment over the world and man. Pupils should not learn for themselves, but for external goals, only because of ambitions⁴⁶. In pupils, there was raised fear of school and school anesthetized their spirit⁴⁷, school made them passive, worried and scared, «tired slaves»⁴⁸:

Our schools strive for giants, but they educate mental and physical illnesses. Eighteen-year-old Newton would be a dwarf against our boy graduating secondary school if they stood trial against one another. That's why our Newton's boy will not happen. His body is sore, his senses soft and dull, curiosity about unknown worlds is none, and the spirit paralyzed by lots of symbols and abstractions of unknown things⁴⁹.

It is obvious that Úlehla is critical about the «old Czech school», in a reform-pedagogical spirit and is looking for a new school, free and decent for pupils. He also looks for free teachers, not teachers as office workers⁵⁰. The new school should be based on the English and, most preferably, American style, where a free citizen's education area was seen, in opposition to the obedient German and Austrian clerks:

⁴⁴ J. Úlehla, *Pedagogical Letters*, Prague, Heritage of Comenius, 1899, pp. 103-121.

⁴⁵ *Ibid.*, pp. 1-2.

⁴⁶ *Ibid.*, p. 8.

⁴⁷ *Ibid.*, p. 4.

⁴⁸ *Ibid.*, p. 9.

⁴⁹ *Ibid.*, p. 10.

⁵⁰ *Ibid.*, p. 15.

Today school is not an institution where individuality is rising to a national bloom and higher development, where the self-made tree of wisdom and education would be enriched by scientific and artistic achievements⁵¹.

And similarly:

This is the difference between our father and the American father. The American father wants to have a son who will be a brave man, a citizen of the free world, and in this way, he will also grow up in schools and later in his life. Our father wants to have a son as a servant, and in this way, sons are educated. What school cannot do that's done by the head of the office. It is a very pitiful phenomenon and the country suffers from a tremendous damage of property both mental and material⁵².

Úlehla criticizes society at that time as the corrupted one, depraving nature of man. Against this state, Úlehla invokes freedom of the individual, his spontaneous development, as he also was strongly influenced by the writings of L.N. Tolstoy. How to combine Úlehla's positivist determinism, mechanics in the concept of an individual and social development with the free development of the individual and personal spontaneity? According to Úlehla, the overall, especially, social development is always resulting in the internal developmental patterns concerning community and, on the other hand, evolution can not only be a determination, but also a possibility to change. Development to perfection is not always completed forever. Particularly in the pedagogical field, Úlehla is optimistic and points to the need for the child (the pupil) to work independently, creatively and thus freely. Positive determinism, evolutionist fatalism or overall pessimism should not overlap any pedagogical optimism, freedom, the individual and the active aspect of learning.

However, positivism did not become the main thought flow of the Czech pedagogical discussion at the end of the 19th century but influenced the language and "grammar" of thinking of Czech teachers' representation connected with the very active teaching societies and official formations. We can ask: Why was the development of positivism linked to the growing teachers' movement in Czech Lands of the monarchy within Czech-speaking teachers? The answer may be different due to a political and partly social orientation of the Czech teaching emancipating from the strong influence of Catholic Church and seeking socially more equitable as well as democratic organization of the society. In this respect, positivism was seen as a doctrine that allows emancipation of teaching, which rejects «old orders» demanding a greater participation in public affairs, more freedom of school management as well as reform of «Herbart school» representing support towards «a free school» based on determinateness of child's development ecc.⁵³ The origin of

⁵¹ *Ibid.*, p. 17.

⁵² *Ibid.*, p. 33.

⁵³ Compared with J. Kopáč, *History of the Czech School and Pedagogy from 1867-1914*,

teachers' associations and central teacher organizations can be read, among other things, as an effort to gain influence and power to promote our own ideas of a «future free school», and a more democratic administration of Czech education within the monarchy. Also selected teachers supposed to be representatives of this direction, and their reformist educational assertions were based on «modern positivistic thinking» that built barrier towards tradition, speculation and gave space for action based on «real» knowledge.

Conclusion

Czech Lands belonged to the Habsburg monarchy as a significant part of the educational center in the Middle Europe. The pedagogical discussion was developed in the middle of the 19th century in the spirit of philanthropy and in 1849, after the university reform, under the strong influence of Herbartism. After 1882, it was the period of division of Prague University, there was created a great possibility to develop Czech pedagogical science in the Czech part of Charles-Ferdinand University. On one hand, Czech pedagogy opposes the “link” of Herbartism and seeks inspiration in English and French philosophy and pedagogy. There are reflected both Comte and Spencer's writings, as well as Darwin's teachings. Lindner's distribution of pedagogy as a science is based on developmental patterns that pedagogy should reflect and explain in the educational field. Although Lindner's anthropology gains a prominent place in his concept of education, we cannot say that Lindner's goal and task of education has biologized or subordinated Darwin's theory and doctrine of natural selection. In Lindner's conception, and later also with other positivist-oriented Czech educators, education is still defined as a primarily “cultural” or ethical – education of the character⁵⁴.

We can say that Czech pedagogy had not only been closely interconnected with the task of «serving» as it was connected with the preparation of secondary school teachers since the 1980s, but had been, in particular, able to lay out such strong scientific foundations that pedagogy as an independent science could be established at the end of the 19th century. It became an independent science based on experimental methods and, later on, markedly on quantitative research. In this respect, Czech pedagogical tradition stood in the opposition towards the German pedagogical debate, which had been developed in Prague. In contrast to philosophical and normative pedagogical science, the representatives of the Czech Pedagogical School developed scientific tradition that was oriented empirically, precisely and experimentally. The pedagogical

discussion in the Czech Lands was characterized by a certain rivalry of the concept of pedagogical science that differed nationally and represented two different conceptions of science and its role in the development of modern society.

Maestros de cuento. Análisis aproximativo de la figura del maestro en la literatura infantil

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Teacher's in tales. An approximate analysis of the figure of teacher in children's literature

ABSTRACT: In this article we will treat the presence of the teacher present in the narrative texts and illustrations of children's literature. We have selected a total of 36 works published throughout the twentieth century, which allowed us to outline a first analysis of the figure of the teacher who is represented in works of fiction. By considering various elements (e.g.: the physical, moral, psychological and social characterization of this figure), we have concluded that in the most of cases the teacher's figure was characterized by appreciable virtues such as the professional vocation, his human involvement and dedication to pupils – virtues which were usually represented in tune with the artistic and narrative style of the work.

EET/TEE KEYWORDS: Teacher's role; History of Education; Children's Literature; Spain; XXth Century.

Introducción

«Y si no volvemos a vernos, recuerda de vez en cuando a tu maestro de tercero que te ha querido»¹. Con estas tiernas palabras, se despidió de uno de sus alumnos el Sr. Crosetti, maestro de la emblemática obra *Cuore* de Edmondo de Amicis (1846-1908)². Fragmentos como éste, entre otros, nos han permitido

¹ E. Amicis, *Corazón*, Madrid, Alba, 1970, p. 145.

² *Cuore* es una novela publicada el año 1876 relacionadas con la infancia. Como detalle interesante, hay que destacar que surge de sus páginas el personaje de Marco, protagonista de la famosa serie de dibujos animados, concretamente del capítulo *De los Apeninos a los Andes*.

captar algunas características de los maestros en la literatura infantil. Una figura fundamental en la vida y formación de la infancia que, en la ficción, ha hecho acto de presencia de variadas formas:

encontramos en multitud de textos el esbozo en sepia, entre el elogio y el ajuste de cuentas, de los maestros y de las maestras que alborotaron las conciencias infantiles y adolescentes con sus saberes, sus ilusiones, su ternura, su indiferencia, su crueldad o sus castigos³.

Con ternura, como decía Crosetti, a veces con humor y, a menudo, con altas dosis de implicación y vocación profesional. En este trabajo⁴ hemos observado a los maestros en la panorámica de la literatura infantil mediante una selección de obras publicadas en el siglo XX, con la excepción de *Cuore* (1876) que corresponde a finales del XIX, una de las novelas en las que la figura del maestro tiene mucho protagonismo. Por otro lado, queremos insistir en la idea que se trata de un trabajo aproximativo y que, por tanto, aún falta camino por recorrer para captar con profundidad las características de los maestros en la literatura infantil. Por ahora, la selección se ha hecho buscando cuentos o novelas donde el maestro tenga presencia suficiente como para poder llevar a cabo su análisis.

1. *Los maestros y su representación en la literatura infantil*

Navegar por el inmenso océano de la literatura infantil no es sencillo cuando se trata de encontrar maestros que tengan una cierta entidad en la historia narrada. Muy rápidamente nos dimos cuenta de que no era un buen criterio hacer una selección de libros en los que el maestro fuera el protagonista. Así pues, decidimos ampliar la muestra para considerar aquellos libros en los que los maestros y maestras fueran personajes relevantes en los hilos argumentales analizados, tanto si eran protagonistas como si no.

Para llevar a cabo la investigación, consultamos algunos ejemplares del fondo histórico de literatura infantil de Catalunya, ubicado en la Biblioteca Xavier Benguerel de Barcelona, así como la Biblioteca Nacional de España, además de la consulta de algunas obras de colecciones particulares. Para saber qué libros podrían ser de interés, antes consultamos diversos trabajos especializados en

³ C. Lomas, *Érase una vez la escuela. Los ecos de la escuela en las voces de la literatura*, Barcelona, Graó, 2007, p. 24.

⁴ Esta investigación fue presentada inicialmente en el XVIII Coloquio de Historia de la Educación que se llevó a cabo en Vic los días 8, 9 y 10 de julio del 2015. Posteriormente, se ha ampliado la muestra con algunos libros de la Biblioteca Nacional de España (Alvarez de Cánovas, Josefina, 1943-1944-1948) y una adquisición particular (Cotarelo de los Ríos, Emilia, 1945) y, en consecuencia, se han reformulado algunos resultados.

literatura infantil⁵. Por otro lado, en cuanto a los libros seleccionados desde la década de los años 80 hasta el momento actual, consultamos la revista «CLIJ» – «Cuadernos de Literatura Infantil y Juvenil» – y su apartado de novedades editoriales, así como el catálogo colectivo de las bibliotecas de la provincia de Barcelona. A los libros encontrados hasta el momento, cabe añadir algunos que son de amplia difusión entre el público infantil y, como último criterio para todas las obras, el marco y el género en el que se desarrollaba la trama debía ser próximo al realismo para que permitiera captar mejor las características del personaje. Si el contexto era de fantasía podían darse situaciones que enmascarasen el perfil real de los personajes que buscamos para este trabajo.

Este procedimiento nos permitió hacer un listado de un total de 36 libros, en los cuales aparecían 55 maestros y maestras, dado que, en algunas obras, este personaje forma parte de un colectivo. En estos casos, hemos considerado el criterio de hacer un análisis conjunto para poder extraer más información al respecto. Cabe decir que, en estos libros, destacan especialmente algunas series narrativas que han tenido mucho éxito entre el público infantil, tales como *Manolito Gafotas*, *Diario del Greg* o *Diario de una colgada*. En alguna de ellas, el maestro o la maestra han sido un único personaje para toda la serie y, en otras, ha formado parte de un colectivo considerando para su análisis el conjunto global de sus características. Teniendo en cuenta todos estos aspectos, cabe decir que algunos de los 36 libros serían un grupo de obras de una serie, con lo que quedarían un total de 21 marcos narrativos. En la siguiente tabla se puede observar la referencia de los libros analizados, a continuación el número de libros por referencia de los libros analizados, sea serie o ejemplar único y, finalmente, el número de maestros presentes en cada libro y/o serie.

| Referencia de la obra analizada | Número de libros analizados | Número total de maestros/as |
|---|-----------------------------|-----------------------------|
| E. Amicis, <i>Corazón</i> , Madrid, Alba, 1886-1970 | 1 | 9 |
| P. Crehuet, <i>Senyor Ruch, mestre d'estudi</i> , Barcelona, Bagañà, 1908 (Ilustraciones de Cornet) | 1 | 1 |
| M. Marinello, <i>Viaje alrededor de la clase</i> , Barcelona, Blas Camí, 1909 (Ilustraciones de Coll Saliati) | 1 | 1 |
| C. Riba, <i>Els sis joans-Joan Drogo</i> , Barcelona, Juventud, 1928 (Ilustraciones de Narro) | 1 | 1 |
| E. Fortún, <i>Celia en el colegio</i> , Madrid, Aguilar, 1934 (Ilustraciones de L. De Ben) | 1 | 5 |

⁵ C. Bravo-Villasante, *Historia de la literatura infantil española*, Madrid, Escuela Española, 1979; M. Castillo, *Grans ilustradors catalans*, Barcelona, Barcanova, 1997; F. Cendán Pazos, *Medio siglo de libros infantiles y juveniles*, Madrid, Ediciones Pirámide, 1986; J. García Padrino, *Libros y literatura para niños en la España contemporánea*, Salamanca, Fundación Germán Sánchez Ruipérez, 1996 y N. Obiols, *Mirando cuentos. Lo visible e invisible en las ilustraciones de la literatura infantil*, Barcelona, Laertes, 2004.

| | | |
|---|---|----|
| Anónimo, <i>La cerda y el cerdito</i> , Barcelona, Sopena, 1940 (¿) (Ilustrador anónimo) | 1 | 1 |
| J. Alvarez de Cánovas, (1943-1944-1948) <i>Mari-Sol colegiala</i> , <i>Mari-Sol maestra rural</i> y <i>Mari-Sol inspectora</i> , Madrid, Magisterio Español, 1943-1944-1948, (Ilustraciones de Pedro Sarragúa (1 y 2) y Cidre (3)) | 3 | 5 |
| E. Cotarelo de los Ríos, <i>Mari-Pepa en el colegio</i> , Barcelona, Claret, 1945 (Ilustraciones de María Claret) | 1 | 2 |
| F. Torres, <i>Fiestas escolares</i> , Barcelona, Salvatella, 1948 | 1 | 1 |
| J.A. Del Cañizo, <i>El maestro y el robot</i> , Barcelona, Cruilla, 1983 (Ilustraciones de Elisa Arguilé) | 1 | 1 |
| E. Lindo, <i>Manolito Gafota</i> , Madrid, Alfaguara, 1994-1995-1997- 1998-1999-2002 (Ilustraciones de Emilio Uberuaga) | 6 | 1 |
| J. Farias, <i>A la sombra del maestro</i> , Madrid, Alfaguara, 1995 (Ilustraciones de Jesús Gabán) | 1 | 1 |
| M. Landa, <i>La bruja y el maestro</i> , Madrid, Anaya, 2001 (Ilustraciones de Asun Balzolza) | 1 | 1 |
| G. Casamajor, <i>És dur ser mestre...</i> Barcelona, Graó, 1997 () (Ilustraciones de Jordi García Sempere) | 1 | 1 |
| N. Carabias, <i>Era Mestra Pèpa</i> , Lleida, Pagès editors, 1999 (Ilustraciones de Assumpta Garriga) | 1 | 1 |
| T. Soler, <i>La mestra Esperança</i> . Alzira, Bromera, 2004 (Ilustraciones de Pablo Ignacio) | 1 | 1 |
| J. Kinney, <i>El diari del Greg</i> , Barcelona, Empúries, 2009-2009- 2009-2010-2010-2010-2012 (Ilustraciones del autor y de Wimpy Kid Inc.) | 7 | 10 |
| R. Russell, <i>El diario de Nikki/ Diari d'una penjada</i> , Barcelona, Molino, 2009-2010-2011 (Ilustraciones de la autora) | 3 | 6 |
| M. Ganges, <i>Fem de mestre</i> , Barcelona, Combel., 2012, (Ilustraciones de Christian Inajara) | 1 | 4 |
| C. Canals, <i>La profesora que hacía faltas de ortografía</i> , Barcelona, Edebé, 2014 (Ilustraciones de José Castro) | 1 | 1 |
| D. Gutman, <i>La mestra Flo no sap ni la o</i> , Barcelona, Brúixola, 2014 (Ilustraciones de Jim Pailllot) | 1 | 1 |

Para hacer el análisis de los personajes, hemos creado un instrumento metodológico que nos ha permitido recoger los datos generales de la obra: título, año de la primera edición, autor/a, ilustrador/a, lengua original y de la edición consultada, localización, género literario, elementos estilísticos dominantes y el contexto y la época en la que se ubica la narración. Posteriormente, nos hemos centrado en los datos del personaje maestro, contemplando su situación narrativa (si es el protagonista, secundario, colectivo o individual), el sexo y la edad, su caracterización física, situación familiar y social, caracterización psicológica, moral, así como la profesional, para captar su estilo docente. Cada una de estas características ha sido concretada mediante las claves narrativas y visuales que nos han hecho deducirlas. Es decir, frases, expresiones

o situaciones del personaje en cuestión sobre las que se puede deducir una considerable humildad, abnegación o cualquier otra característica. Finalmente, hemos recogido cuál sería la finalidad de la obra y si la historia narrada tiene una moraleja poco o muy explícita.

2. Maestros y género literario: entre el drama, el realismo y el humor

Las obras analizadas combinan estilos y géneros literarios diversos, pero que se concentran básicamente en el realismo, el humor y el drama. En algunas de ellas, el maestro es una persona con un evidente aire de tristeza, a la vez que muestra cierta dosis de moralidad que, básicamente, consiste en remarcar su función docente vocacional y entregada. Lo vemos, por ejemplo, en estas palabras del protagonista de *Viaje alrededor de la clase* (1909) en la que se expresa, metafóricamente, el propósito de un buen maestro: «la escuela es como un campo; el maestro siembra la semilla del saber y de la virtud en las tiernas inteligencias confiadas a su cuidado»⁶. Y también en estas palabras del Sr. Perboni, uno de los maestros de *Cuore* (1886): «Yo no tengo familia. Mi familia sois vosotros. Hasta el año pasado tenía a mi madre: se ha muerto. Me he quedado solo. En el mundo sólo os tengo a vosotros. Ya no tengo otro cariño ni otra preocupación. Vosotros tenéis que ser mis hijos. Yo os quiero y es preciso que vosotros me queráis. No quiero tener que castigar a nadie»⁷.

Este tono melancólico, aunque con estilos distintos, lo encontramos también en otras obras como *A la sombra del maestro* (1995) en la que Juan Farias hace un retrato costumbrista de un maestro de escuela rural, un chico trabajador y honrado que es acosado por un alcalde sospechoso de corrupción y caciquismo. En la novela se forja una narración llena de momentos emotivos y ubicados en unas tierras gallegas donde la infancia es un sostén económico para sus familias y, por lo tanto, su asistencia escolar se ve claramente disminuida cuando le corresponde recoger almejas, labor a la que se dedica la casi totalidad de los habitantes del pueblo marítimo.

El humor ha estado también muy presente en la literatura infantil y en las publicaciones periódicas cuando ha tratado la figura docente⁸. Un muy buen

⁶ M. Marinello, *Viaje alrededor de la clase*, Barcelona, Blas Camí, 1909, pp. 6-7.

⁷ E. Amicis, *Corazón*, Madrid, Alba, 1970, p. 10.

⁸ Es notorio el gran número de caricaturas sobre maestros y escenas escolares que han estado presentes en muchos formatos. Entre ellos, los de las publicaciones periódicas y que algunos especialistas han recogido (M.A. Manacorda, *Storia illustrata dell'educazione: Dall'antico Egitto ai giorni nostri*, Firenze, Giunti Gruppo Editoriale, 1992). También encontramos ejemplos en el teatro como *El maestro de escuela* (1881) de Juan del Peral que obtuvo un gran éxito en su época: <<http://bvpb.mcu.es/museos/es/consulta/registro.cmd?id=437177>> (ultimo acceso: 07.10.2016).

ejemplo es el entrañable *Senyor Ruch, mestre d'estudi*, publicada en 1908⁹ en la que se narra las peripecias de un pobre asno que, cansado de su triste condición, decide escapar y ejercer de maestro, situación que genera divertidas anécdotas que nos remiten al consejo moral de no tener deseos inalcanzables. Y, claramente, el humor está presente en la serie *Mari-Pepa*¹⁰ en que la protagonista va a parar interna a una escuela de monjas como consecuencia de una de sus tantas travesuras, aunque las siga practicando sin descanso. A pesar de ello, esta visión humorística, que sí caracteriza claramente a la niña protagonista, no es notoria en el personaje de las monjas encargadas de su educación.

Siguiendo con la línea humorística, en la década de los años noventa, aparece una serie narrativa que consigue un gran éxito. Se trata de *Manolito Gafotas*, de Elvira Lindo, en la que encontramos a una maestra muy curiosa. Estamos hablando de la *Sita Asunción*, que aparece, prácticamente, en todas las novelas de la saga (exceptuando un par) y con una marcada relevancia en las tramas argumentales. La Sita llega a hacerse tan entrañable como imprescindible, tanto para el propio Manolito, como para los lectores: «yo a mi sita la quiero lejos, pero la quiero»¹¹. Se trata de un personaje cargado de ironía, pero tan caricaturesco en sí mismo que permite hacer burla de cuestiones muy próximas al magisterio:

Este año quiero que preparemos el carnaval como si fuera el último carnaval de nuestra vida [...] y tenéis que demostrar a todo el mundo que sois unos niños como Dios mandan y no esos delincuentes que parecéis¹².

Es decir, la idea que ampara a la obra es la del deseo, aunque cargado con dosis irónicas, de un futuro mejor para sus alumnos, lo cual comentaremos en el próximo apartado por tratarse de una de las características más notorias del maestro en la literatura infantil.

En resumen, sean las obras de un género u otro, humor, drama o realismo, podemos observar que no hay una línea cronológica que las haga representativas de ninguna época en concreto.

3. Maestros esperanzados y de buen talante

En términos generales, la mitad aproximadamente de maestros analizados acostumbran a caracterizarse por su buen talante profesional. Son muy responsables y se toman muy en serio su trabajo. También tienen un punto de

⁹ P. Crehuet, *Senyor Ruch, mestre d'estudi*, Barcelona, Bagañà, 1908.

¹⁰ E. Cotarelo, *Mari-Pepa en el colegio*, Barcelona, Claret, 1945.

¹¹ E. Lindo, *Manolito Gafotas*, Madrid, Alfaguara, 1994, p. 62.

¹² *Ibid.*, p. 105.

severidad con sus alumnos, aunque a menudo encontramos muestras afectuosas con ellos. Como estilo docente destacaríamos que, en algún momento, hay ciertas transgresiones con el ánimo de innovar, de romper moldes. Amalia Zapatero, protagonista de *La profesora que hacía faltas de ortografía* (2014)¹³ busca inventar nuevas grafías para sus alumnos y comete incorrecciones ortográficas con el propósito de motivarlos a escribir con propiedad. Por otro lado, AJ – en *La mestra Flo no sap ni la o!* (2014)¹⁴ – nos relata como la docente les dice a sus alumnos que no tiene ni la más mínima idea de multiplicar, ni de leer, ni de escribir, estrategia que utiliza para motivarlos a aprender a hacerlo para enseñarle a ella. Y Nicómedes Peribáñez, protagonista de *El maestro y el robot* (1983)¹⁵ es el docente que mejor representa la reivindicación del aprendizaje significativo y muchos de los principios de la escuela activa para sus alumnos, tratando de incorporar sus habilidades, sus intereses, en definitiva, su voz en la escuela. Mucho más lejano en el tiempo, el protagonista de *Viaje alrededor de la clase* (1909)¹⁶, pretende estimular a sus alumnos aprendiendo historia de los objetos cotidianos, de los que tienen más próximos (tintero, papel...). Mariasun Landa nos presenta un docente, en *La bruja y el maestro* (2001)¹⁷ que se pasa el día explicando cuentos a sus pequeños discípulos, los cuales quedan fascinados ante tan sensacional narrador. Y uno de los ejemplos más ricos por su perfil es el personaje de *Mari-Sol*¹⁸ protagonista de una serie en que crece de niña a mujer y consigue su sueño de ser maestra e inspectora escolar, o *maestra de maestras*, como dice el propio texto. Número 1 de su promoción, *Mari-Sol*, va más allá de un buen talante. Es un personaje que representa la perfección humana en todos los aspectos posibles – en consonancia con la figura del maestro – y que, cuando conoce a doña Lolita (*Mari-Sol colegiala*, 1943), es cuando descubre cuál es su misión en el mundo:

En efecto *Mari-Sol*, ser inspectora es emocionante de veras. Sales de casa por la mañana, después de la oración, y vas de escuela en escuela sembrando a voleo la buena semilla, que siempre prende en el corazón de las niñas, porque en el de las maestras ya está prendida¹⁹.

Sobre estos maestros, con buen talante docente, nos gustaría añadir otra cuestión que consideramos muy interesante y es que, muchos de ellos, quieren mostrar a sus alumnos un futuro esperanzador. En estos casos, el presente no

¹³ C. Canals, *La profesora que hacía faltas de ortografía*, Barcelona, Edebé, 2014.

¹⁴ D. Gutman, *La mestra Flo no sap ni la o!*, Barcelona, Brúixola, 2014.

¹⁵ J.A. Del Cañizo, *El maestro y el robot*, Barcelona, Cruilla, 1983.

¹⁶ Marinello, *Viaje alrededor de la clase*, cit.

¹⁷ M.A. Landa, *La bruja y el maestro*, Barcelona, Amaya, 2001.

¹⁸ J. Álvarez de Cánovas, *Mari-Sol colegiala. Libro de lectura para niñas*, Madrid, Magisterio Español, 1943; *Mari-Sol maestra rural. Libro de lectura para niñas*, Madrid, Magisterio Español, 1944 y *Mari-Sol inspectora. Almería. II Parte. Libro de lectura para niñas*, Madrid, Magisterio Español, 1948.

¹⁹ *Ibid.*, p. 153.

lo es demasiado. Los niños y niñas provienen de familias con pocos recursos y el ambiente está impregnado de un cierto espíritu conformista y resignado: «Vosotros, delincuentes, erais hasta hace media hora que empezó el recreo, la vergüenza de Madrid, pero todo esto se va a arreglar en los próximos quince días»²⁰. Esto les dice la Sita Asunción que no escatima cualquier canal de comunicación para mostrar que sus alumnos pueden llegar a ser alguna cosa más que una pandilla de marginados sociales. Esta reivindicación de igualdad social también la encontramos en la obra *A la sombra del maestro* (1995)²¹, cuando éste no está nada dispuesto a que los niños y niñas vayan a trabajar en lugar de ir a la escuela y así se lo transmite al alcalde, lo que le acaba costando muy caro: «Al maestro, por empeñarse en enseñar, que es decir verdades, le quitaron la escuela»²². Un final similar al de *La profesora que hacía faltas de ortografía*²³ y que recuerda a muchas películas en las que el docente *transgresor*, aquel que busca cambios considerados peligrosos para la institución, es apartado de la misma²⁴.

Ciertamente hay otro grupo de maestros donde esta tendencia a innovar, a aportar nuevos aires pedagógicos a la profesión, no es tan evidente. Tienen un talante más bien convencional – por ejemplo, en las series de Greg y Nikki²⁵– y no muestran un gran afecto por sus alumnos, lo cual sería muy característico de las monjas de *Celia en el colegio* (1934)²⁶ que son las encargadas de custodiar a la traviesa niña.

4. Maestros y maestras solitarios de vidas ideales

Algunos de los personajes analizados presentan unas características personales y profesionales que podrían considerarse como ideales. Es decir, y sin que las épocas sean una variable significativa, los maestros encarnan un personaje ideal. De los maestros analizados, esta proximidad a la idealidad se traduce en virtudes tales como la bondad, la abnegación, la vocación y el afecto que profesan a sus alumnos. Un cúmulo de virtudes que se encuentran en frases como las siguientes:

²⁰ E. Lindo, *Manolito tiene un secreto*, Madrid, Alfaguara, 2002, p. 19.

²¹ J. Farias, *A la sombra del maestro*, Madrid, Alfaguara, 1995.

²² *Ibid.*, p. 52.

²³ Canals, *La profesora que hacía faltas de ortografía*, cit.

²⁴ N. Obiols, *Profesores y adolescentes en el cine*, «Making Of», nn. 88-89, pp. 7-25.

²⁵ J. Kinney, J. *El diari del Greg*, Barcelona, Empúries, 2009-2009-2009-2010-2010-2010-2012 y R. Russell, *El diari de Nikkil Diari d'una penjada*, Barcelona, Molino, 2009-2010-2011.

²⁶ E. Fortún, *Celia en el colegio*, Madrid, Aguilar, 1934.

recordaré los dos años que pasé en tu clase, donde tantas cosas aprendí, donde tantas veces te vi enferma y cansada, pero siempre activa, siempre indulgente, angustiada si alguno cogía un mal vicio en la forma de escribir [...]»²⁷.

O en esta otra: «Amo al maestro como a otro padre; me da consejos, me enseña, me ama; por eso siempre, cuando me acuesto, por él al cielo lanzo plegarias»²⁸. Los maestros más próximos a este concepto de idealidad serían, sin lugar a dudas, los nueve personajes de *Cuore* (1886), el protagonista de *Viaje alrededor de la clase* (1909), el personaje de *Mari-Sol* (1943, 1944 i 1948), las monjas de *Mari-Pepa* (1945), el de *Fiestas escolares* (1948), Nicómedes Peribáñez, protagonista de *El maestro y el robot* (1983), *A la sombra del maestro* (1995) y Amalia Zapatero, protagonista de *La profesora que hacía faltas de ortografía* (2014). Después seguirían algunos maestros que, aunque la trama narrativa no explicita excesivamente sus virtudes, sí que se desprende del texto una cierta idealidad que, en función del género literario, adquiere matices distintos. Por ejemplo, en *Sis Joans* (1928) no es exactamente un maestro ideal lo que aquí se nos muestra, pero sí se transmite una habilidad especial y singular en estilo docente:

És el cas, que el mestre d'aquell poble tot ho feia cantant. Tenia una cantarella que estirant-la un xic per ací o arronsant-la una mica per allà, servia per a tot: per a les taules de sumar i de multiplicar; per a les llistes de pecats que no s'han de fer i per a les oracions més útils²⁹.

Pero cuando el humor en la trama narrativa está muy presente, la idealidad del maestro queda enmascarada no siendo tan explícita en estas obras, aunque no inexistente. Este el caso de *La mestra Flo no sap ni la o!* (2014) donde se nos muestra una maestra muy competente, que está pendiente de todas las necesidades de sus alumnos y que es capaz de ejercer su profesión con gran responsabilidad, aunque detrás de una imagen que, precisamente, está en las antípodas de la idealidad. La maestra representa un papel ante los alumnos de inutilidad total exigiéndoles que deban ser ellos quienes le enseñen. Con esta antinomia, pretende estimularlos y sorprendentemente pican el anzuelo y asumen las funciones docentes con la despistada maestra: «No hi havia res a fer. La mestra Flo devia ser la professora més tanoca de la història mundial!»³⁰. Así, la maestra Flo, mediante un ficticio engaño, viene a representar a una maestra

²⁷ Amicis, *Corazón*, cit., p. 19.

²⁸ F. Torres, *Fiestas escolares*, Barcelona, Salvatella, 1948, p. 89.

²⁹ «Es el caso, que el maestro de aquel pueblo todo lo hacía cantando. Tenía un tonillo que estirándolo un poco por aquí o encogiéndolo un poco por allá, servía para todo: para las tablas de sumar y de multiplicar, para las listas de pecados que no se deben cometer y para las oraciones más útiles». C. Riba, *Els sis joans*, Barcelona, Joventud, 1928, p. 102.

³⁰ «No había nada que hacer. ¡La maestra Flo debía ser la maestra más boba de la historia mundial!» (Gutman, *La mestra Flo no sap ni la o!*, cit., p. 20).



Pic. 1. De izquierda a derecha: El protagonista de *Viaje alrededor de la clase* (1909); la maestra Flo en un momento relajado imaginada por el alumno protagonista de *La maestra Flo no sap ni la O*, 2014; *La bruja y el maestro*, 2001 y *La mestra Esperança*, 2004 (M. Marinello, *Viaje alrededor de la clase*, Barcelona, Blas Camí, 1909; D. Gutman, *La maestra Flo no sap ni la o*, Barcelona, Brúixola, 2014; M.A. Landa, *La bruja y el maestro*, Barcelona, Barcanova, 2001 y T. Soler, *La mestra Esperança*, Alzira, Bromera, 2004).

preocupada por su trabajo y sus alumnos. Una maestra ideal, a pesar de los matices humorísticos.

Un caso distinto, pero que también guarda cierta similitud con el anterior por el sentido del humor y su idealidad encubierta, es la maestra de la serie *Manolito Gafotas*. *Sita* no es precisamente una muestra de idealidad. Tacha de «delincuentes» a sus alumnos, cae y se lesiona cuando quiere hacer una entusiasta y espontánea exhibición de baile, muestra unos ataques de ira sin tapujos, y a menudo les echa en cara a los alumnos que, cuando se jubile, no los quiere volver a ver jamás en su vida. La fuerza y el carisma del personaje es innegable y hacen que el lector, igual que Manolito, le acabe cogiendo un gran afecto a esta maestra «brutal». *Sita* es un personaje ideal en el sentido de que, alguien que es capaz de decir a sus alumnos «sois tan tontos que no sabéis ni copiar»³¹, es también capaz de invertir esfuerzos titánicos para conseguir que sus alumnos logren el progreso y la superación que su estigma social les impone.

Por otro lado, encontramos aquellos maestros entre los que la idealidad no es, ni mucho menos, ningún asunto de importancia. Trabajan de maestros como podrían desempeñar cualquier otro oficio. Incluso, hay un caso en que justamente el cuento sirve para todo lo contrario, lo que no deja de ser un modo de evidenciar cuál debería ser la idealidad. Avergonzarlo por su inmoralidad

³¹ Lindo, *Manolito Gafotas*, cit., p. 85.

sería lo que encontraríamos en la finalidad de *La cerda y el cerdito* (1940). Un hijo desagradecido que, finalmente, es castigado por su propia madre:

Lo que tú acabas de hacer es una marranada; y una marranada sólo puede hacerla un marrano. A indicación de la madre desnudaron a cerdito, que quedó convertido en un verdadero cerdo. Entonces surgieron entre los animales dos perros y dos lobos, y el uno por aquí y el otro por allá se lo comieron vivo. Los ingratos acaban siempre así³².

Por otro lado, encontramos una característica común entre todos estos maestros de los que no destaca especialmente la idealidad: son personajes clave para el pretexto narrativo de la obra que, en la mayoría de los casos analizados, es humorístico. Uno de los ejemplos más emblemáticos es, sin duda, *Senyor Ruch, mestre d'estudi* (1908). En este cuento se nos relata las desafortunadas, a la vez que cómicas, aventuras de un asno que quiere emular a su amo y hacer de maestro. El azar lo conduce a un pueblo donde, casualmente, estaban esperando la llegada de uno y, como él se había preocupado de conseguir una indumentaria adecuada, pasa desapercibido y asume el cargo hasta que las sandeces que comete le acaban por desvelar la gran verdad de la historia:

Aquest abrigh y aquestes ulleres y aquet barret que portes no t'han servit per fer de sabi. Perquè el barret tapava un cap de ruch y a través dels cristalls de les ulleres ni miraven ulls de bestia y l'abrigh no conseguia dissimular la cua³³.

Sin llegar a estos extremos, encontraríamos las cinco monjas presentes en *Celia en el colegio* (1934)³⁴. No son ideales porque sencillamente la obra no persigue este propósito. El verdadero propósito de la serie de Celia es el de hacer reír al lector con unas tramas narrativas protagonizadas por una niña divertida y entrañable³⁵. Por tanto, la monjas cumplen perfectamente su propósito que es el de reprimir a la traviesa criatura conocida con el nombre de Celia que no desiste ni un instante de llevar a cabo sus peregrinas ideas. Curiosamente las monjas que aparecen en el cuento de Mari-Pepa (1945)³⁶, aunque desempeñan el mismo rol, sí se nos muestra y se exalta la personalidad bondadosa y cuidadosa de la madre superiora. Pero volviendo a la idea del maestro como pinza narrativa, este hecho tiene un enorme parecido con series literarias que no obstante se alejan mucho de la calidad literaria de Elena Fortún³⁷. En ellas, el

³² Anónimo, *La cerda y el cerdito*, Barcelona, Sopena, 1940 (¿), p. 17.

³³ «Este abrigo y estas gafas y este sombrero que llevas no te han servido para hacer de sabio. Porque el sombrero tapaba una cabeza de asno y través de los cristales de las gafas ni miraban ojos de bestia y el abrigo no conseguía tajar la cola» (Crehuet, *Senyor Ruch, mestre d'estudi*, cit., p. 94).

³⁴ Fortún, *Celia en el colegio*, cit.

³⁵ En el año 1945 se hicieron unas votaciones entre los niños madrileños para saber cuál era su personaje literario preferido y la ganadora fue Celia. En F. Cendán Pazos, *Medio siglo de libros infantiles y juveniles*, Madrid, Ediciones Pirámide, 1986, p. 175.

³⁶ Cotarelo, *Mari-Pepa en el colegio*, cit.

³⁷ Pseudónimo de Encarnación Aragoneses Urquijo (1886-1952).



Pic. 2. Ilustración en la que podemos ver al protagonista de *La cerda y el cerdito* (1940) repudiando a su propia madre (Anónimo, *La cerda y el cerdito*, Barcelona, Sopena, 1940 (¿), p. 15).

Ciertamente hay maestros de los que no sabemos apenas nada al respecto – desconocemos si algunos de ellos viven en contextos muy o poco elitistas – pero hay detalles que hacen pensar que sus vidas son humildes y, en algunos casos, explícitamente humildes: «El maestro, al quedarse sin casa y sin escuela, alquiló habitación en casa de la viuda y metió allí sus pocas cosas, pocas, algunos libros y ropa»⁴⁰. O Amalia Zapatero, la protagonista de *La profesora que hacía faltas e hortografía*, cuando en la obra se nos comenta que no podía permitirse un buen alojamiento⁴¹. Por otra parte, y de forma muy evidente en muchas obras, esta sencillez va acompañada de soledad que, en algunos casos, se proyecta en el afecto que sienten por sus discípulos a los que consideran su única familia⁴².

Encontramos un par de casos de maestros enamorados. Uno de ellos es el protagonista de *A la sombra del maestro* (1995) en la que se hace referencia al enamoramiento que vive con una chica del pueblo. Y, el otro, es *La bruja y el*

personaje maestro es la pinza que sirve para resaltar al verdadero protagonista. El grupo de maestros de la serie *Diario de Greg* (del 2009 al 2011) y *Diario de Nikki* (del 2009 al 2001)³⁸ son personas – 10 en el primer caso y 6 en el segundo – que actúan como docentes muy convencionales. Maestros que cualquiera podría recordar de manera muy parecida. Se enfadan, vigilan, castigan y premian y, de vez en cuando, el director suelta un discurso aleccionador a sus alumnos, dicho con otras palabras parecidas a las de la novela, un «rollo sobre el respeto, acompañado de un golpecito en el hombro»³⁹. Digamos que en la trama el maestro es sencillamente una pinza humorística para que el niño «pseudoadolescente» protagonista brille con intensidad.

Si alguna característica tiene la vida de los maestros analizados es que es de una sencillez muy remarcable y, en algunos casos, esta austeridad en usos y costumbres va acompañada de soledad.

³⁸ Kinney, *El diari del Greg*, cit y Russell, *El diario de Nikki/ Diari d'una penjada*, cit.

³⁹ J. Kinney, *Diari del Greg: Atrapados en la nieve*, Barcelona, Empúries, 2012, pp. 67-68.

⁴⁰ Farias, *A la sombra del maestro*, cit., p. 70.

⁴¹ Canals, *La profesora que hacía faltas de hortografía*, cit., p. 12.

⁴² *Ibid.*, p. 15.

maestro (2001) en el que ella, la bruja, se enamora perdidamente de un maestro fascinado por el arte de la narración oral. Lo que quiere decir que, hacer de maestro en los cuentos, no está reñido del todo con llevar una vida de pareja. Aunque sean casos minoritarios.

5. *La imagen de los maestros y la sintonía entre texto e ilustración*

De los 55 maestros analizados, hay un total de 11 que no tiene representación ilustrada. En los libros en los que sí existe, los estilos más predominantes son el realismo y la caricatura, con matices en cuanto al estilo y detalles estilísticos diferenciados. Por ejemplo, en *La bruja y el maestro* (2001), la ilustradora Asun Balzola muestra su estilo tan particular propio de un trabajo de mucha calidad. A pesar de ello, se hace muy difícil encasillar la ilustración de los cuentos en determinados estilos artísticos como se hace habitualmente en otras expresiones artísticas. Pero en términos generales, encontramos dos tipos de representaciones visuales de los maestros. Unos muy realistas y otros muy caricaturescos. Lo que coincide con el estilo narrativo de la obra. Si el texto se puede considerar como del género realista, su imagen, estilísticamente hablando es coherente. Y, si el texto tiene un tono humorístico, la imagen del maestro también lo es. Algunos ejemplos bastante evidentes de esta sintonía lo encontramos en *Sita*, la maestra del *Manolito Gafotas*. Emilio Uberuaga, uno de los ilustradores más reconocidos a nivel nacional e internacional, hizo un retrato en el que combina lo grotesco y humorístico del entrañable personaje.

La caricatura contribuye a reforzar esta sintonía humorística entre imagen y texto, entre los que destacan las ilustraciones de Gaietà Cornet en *Senyor Ruch, mestre d'estudi* (1908), libro e ilustrador muy estudiado por los expertos en la materia⁴³ y también las ilustraciones de María Claret per a *Mari-Pepa* (1945). Cabe decir que, en el caso de la serie *Mari-Sol*, el ilustrador de las dos primeras obras de la serie (1943 i 1944)⁴⁴, Pedro Sarragúa, opta por una curiosa simbiosis entre el realismo y caricatura, otorgando a la obra una cierta ambivalencia entre la ternura y proximidad al público infantil y al de los adultos, mediante una línea mucho más realista.

Por otro lado, cabe decir que la relación de la imagen con el texto, en la mayoría de los casos es especificadora, es decir, es el ilustrador quien decide

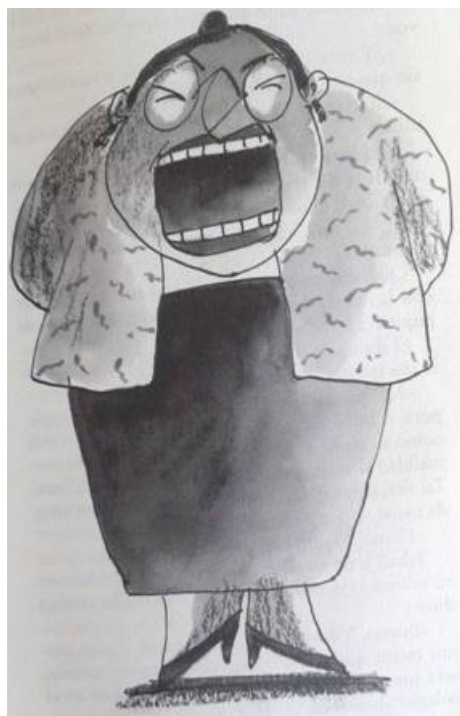
⁴³ M. Castillo, *Grans il·lustradors catalans*, Barcelona, Barcanova, 1997 y T. Duran, *Crebuet, Pomeu, Senyor Ruch, mestre d'estudi* (1908), en M. Baró, T. Colomer, T. Mañà (coord.), *El patrimoni de la imaginació: Llibres d'ahir, per a lectors d'avui*, Palma, Institut d'Estudis Baleàrics, 2007, pp. 42-46.

⁴⁴ J. Álvarez de Cánovas, *Mari-Sol colegiala. Libro de lectura para niñas*, Madrid, Magisterio Español, 1943 y *Mari-Sol maestra rural. Libro de lectura para niñas*, Madrid, Magisterio Español, 1944.

el aspecto físico del personaje siendo en muy pocas ocasiones en las que se ha encontrado una descripción física detallada en el texto.

6. *Un apunte final: ¿para qué sirve la presencia de los maestros en los cuentos infantiles?*

Uno podría caer en el error de que la literatura para niños y niñas debiera cumplir los propósitos de cualquier acción pedagógica diseñada con una intencionalidad educativa explícita. Decimos que es un error porque, la literatura para niños, igual que la literatura en general, es por encima de todo una creación artística y, como tal, no debe estar sometida a imperativos que la podrían adulterar transformándola en algo distinto, a medio camino entre un material didáctico y un cuento. En definitiva, en un instrumento alejado del potencial artístico para el que ha sido creada. No obstante, es evidente que la literatura infantil tiene, en cierta manera, unos condicionantes diferenciados de los de la literatura adulta dado el público al que va destinado.



Pic. 3. Ilustración de Emilio Uberuaga de la Sita Asunción (E. Lindo, *Los trapos sucios*, Madrid, Alfaguara, 1997).

En cualquier caso, decimos todo esto porque, de lo que estamos convencidos, es que de estos análisis a los que nos dedicamos no debería deducirse que sirvan para proyectar sugerencias de cambios en las obras analizadas, con la intención de crear prototipos algo más políticamente correctos. Las obras son como son, algunas con más o menos calidad, pero nuestra pretensión, desde luego no es la de «pedagogizar» la literatura infantil.

Aunque, pensando en qué podemos hacer con estos datos a nivel formativo, nos gustaría rememorar que, en nuestra experiencia docente, la ficción nos ha ofrecido a menudo posibilidades muy sugerentes de cara a la formación de los maestros. Y es la de mostrar a unos que ejercen la profesión en la que hemos decidido formarnos. Lo que ya es de por sí un ejercicio reflexivo interesante. Los vemos en situaciones reales o irreales. Algunos muy distantes de nosotros y prácticamente imposibles (*El maestro* y

el robot, 1983) y otros algo más posibles (*Manolito Gafotas* o *El diari de Greg*).

Vemos maestros que toman decisiones, que sienten, que lloran y que ríen (o las dos cosas a la vez), que respiran, que se enfadan, que se equivocan, que hacen el ridículo, que sufren o que son verdaderos magos de la transformación social. Y eso nos ayuda. Nos ayuda a pensarnos, a proyectarnos, a *pensarnos* mejor. *Yo esto no lo haría jamás, ¿o quizás sí?* Son cosas que, quizá, cuando hemos visto una película o leído un libro, se nos puede ocurrir. También para pensar que, como dice la tópica frase, la realidad supera la ficción. Es un aprendizaje social que la ficción sabe brindar mediante unas tramas ubicadas en espacios y situaciones muy peculiares. Y nosotros, lectores o espectadores, puede que lo incorporemos en nuestro talante docente. Y pararse a pensar sobre ello pensamos que puede aportar grandes beneficios a los futuros maestros.



Pic. 4. El maestro humano realizado por Cornet (P. Crehuet, *Senyor Ruch, mestre d'estudi*, Barcelona, Bagaña, 1908).

Conclusiones

Una de las primeras conclusiones a las que hemos llegado con nuestro trabajo es que hay pocos maestros en el universo de la literatura infantil, lo que podría tener cierta relación con el hecho de que, a menudo en la ficción, se buscan espacios y tiempos distintos a la vida cotidiana. Es mucho más fácil sumergirse en la ficción si ésta nos traslada a una nueva dimensión, diferenciada de la vida real. Otra conclusión a la que hemos llegado es que, los géneros literarios no muestran relación con las épocas históricas. Humor o drama son expresiones literarias atemporales, aunque el registro narrativo sí está muy diferenciado por épocas. Para entendernos, sería impensable encontrar el léxico de Elvira Lindo en los años veinte o al revés. Pero el género, entendido como categoría general, no se concreta en un tiempo determinado, al menos en las obras analizadas⁴⁵.

Por otro lado, hemos constatado que hay una percepción bastante positiva de la figura del maestro. Y, en algunos casos, destaca de forma muy evidente, su

⁴⁵ Con una muestra mucho más amplia, y en otro tipo de análisis de la literatura infantil, sí se percibe una presencia más numerosa de obras de índole dramática a principios del siglo XX y un crecimiento del sentido del humor a partir de los años 60 del mismo siglo. En: Obiols, *Mirando cuentos. Lo visible y lo invisible en la literatura infantil*, cit.

vocación o el afecto que sienten por sus alumnos expresado, eso sí, de formas distintas y acordes al género y a la época. De hecho, esta visión concuerda con la idealidad comentada en este trabajo. Hay muchos maestros que se acercan a una idealidad y un buen talante docente y, también, a una manera de vivir humilde y austera. Por otro lado, esta idealidad a menudo va sincronizada con los buenos deseos por parte del docente hacia sus discípulos y un futuro mejor. Lo cual es evidente cuando el contexto de los alumnos es desfavorecido.

Hay que añadir que, cuando esta idealidad no acompaña a los maestros de las narraciones analizadas, corresponde a cuando el personaje adquiere una función de pinza narrativa que hace recaer con fuerza la atención del lector hacia otra dirección y que acostumbra a ser el protagonista niño o adolescente. Es decir, hay maestros ideales cuando estos, como personajes, son un tema muy destacado en la novela o el cuento. Y no lo son cuando el interés de la trama es otro y el maestro actúa como satélite argumental.

Por otro lado, en cuanto a la moraleja más o menos explícita de la historia, podemos concluir que, a cuanto más avanza el tiempo, más implícita resulta. Desde unos primeros textos en los que la figura del maestro es exaltada y concretada alrededor de una idea moral muy explícita que cabalga entre respeto y compasión, hasta tramas más actuales en las que los y las maestras son representados con virtudes evidentes, pero entrelazadas con anécdotas de diversa índole.

En cuanto a la expresión visual del maestro, hay una clara sintonía textual y artística. Drama y realismo se expresan en clave de realismo y humor, mediante la caricatura. Y es el ilustrador/a quien de una forma mayoritaria es el responsable de la concreción física del personaje.

Para terminar, trabajar con la ficción, sin ánimo de transformarla, es una de las finalidades de este trabajo. Mediante los textos literarios, uno puede reflexionar sobre la educación en un marco diferente:

la literatura describe y cuestiona realidades educativas, pero también en ocasiones crea realidades todavía inexistentes, y con ellas genera conocimiento pedagógico proyectivo: conocimiento de cómo deberían ser las cosas de la educación⁴⁶.

Y no tenemos ninguna duda que conocer como son y qué hacen los maestros en la literatura nos ayuda a este propósito. Saber cómo quieren ser y cuáles son sus finalidades como profesionales. El maestro imaginado en los cuentos, con su idealidad y sus defectos a cuesta, puede resultar un interesante y sugerente espejo fiel o distorsionado en el que uno puede contemplarse y descubrirse a sí mismo.

⁴⁶ J. Trilla, *Pedagogías narrativas*, en Id., *La aborrecida escuela. Junto a una pedagogía de la felicidad y otras cosas*, Barcelona, Laertes, 2002, p. 149.

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La «Rivista di Filosofia Neo-Scolastica» e la pedagogia (1909-1923)

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The «Rivista di Filosofia Neo-Scolastica» and the Pedagogy (1909-1923)

ABSTRACT: The Neo-scholastic school had great influence on the Italian pedagogical history of the twentieth century. This trend was affirmed by the second half of the twenties, but began to develop before through the group of scholars gathered around the prestigious journal «Rivista di Filosofia Neo-Scolastica», founded in 1909 by Father Agostino Gemelli and Giulio Canella. This article aims to investigate the pedagogical interest of the journal by analyzing the issues published from 1909 until 1923. The paper explores the following aspects of the journal: topics on which the journal drew the attention, links with other catholic circles, and the interpretation provided for other coeval schools of thought.

EET/TEE KEYWORDS: History of Pedagogy; Neo-scholastic school; Philosophy; Italy; XXth Century.

Gli studi relativi alla pedagogia italiana del Novecento sono pressoché concordi nel ritenere che la corrente cattolica, dopo la complessa stagione attraversata durante l'«età del positivismo», ritrovò un ruolo di primo piano nello scenario italiano a partire dalla seconda metà degli anni Venti, grazie soprattutto all'affermazione della scuola pedagogica neoscolastica¹. Nell'ascesa

¹ Sulla pedagogia cattolica primo novecentesca e sulla corrente neoscolastica si vedano: M. Casotti, *La neoscolastica e la storia della pedagogia*, «Pedagogia e Vita», n. 4, 1960-1961, pp. 292-302; M. Laeng, *Le correnti cattoliche contemporanee*, in L. Volpicelli (ed.), *La pedagogia*, Milano, Vallardi, 1970, vol. VI, pp. 613-731; E. Giammancheri, *La pedagogia idealistica e l'Università Cattolica*, «Pedagogia e Vita», n. 1, 1971-1972, pp. 31-59, ora in Id., *Novecento pedagogico italiano, a cura di Giorgio Chiosso*, Roma, Editrice Studium, 2015, pp. 37-72; M.

di questo vivace movimento, il 1924 rappresentò un anno di svolta per una serie di ragioni.

La prima fu la costituzione, nell'alveo dell'Università Cattolica del Sacro Cuore, dell'Istituto Superiore di Magistero «Maria Immacolata», che nei decenni seguenti rappresentò uno dei principali crocevia della riflessione educativa cristiana. La sua fondazione manifestò la volontà del gruppo gemelliano di proporsi, anche sul piano pedagogico e scolastico, come un autorevole punto di riferimento per la cultura cattolica e non².

La seconda consiste nella chiamata del neoidealista Mario Casotti sulla cattedra di pedagogia dell'ateneo milanese³, un trasferimento destinato a segnare profondamente la riflessione educativa cattolica novecentesca. Abbracciato il progetto del Gemelli, infatti, l'ex allievo di Gentile mise a punto, soprattutto con le più sostanziose opere uscite negli anni Trenta, una coerente ed organica elaborazione in cui la pedagogia neoscolastica trovò «la sua sistemazione più compiuta e convinta»⁴. Un autore nel quale non solo si identificò l'ateneo milanese sino almeno agli anni Sessanta, ma anche una buona parte della più larga corrente cattolica italiana.

Mencarelli, *Lo spiritualismo cristiano italiano contemporaneo*, in *Nuove questioni di storia della pedagogia*, Brescia, la Scuola, 1977, vol. III, pp. 593-636; N. Galli, *Le scienze dell'educazione*, in *L'Università Cattolica a 75 anni dalla fondazione. Riflessioni sul passato e prospettive per il futuro*, Milano, Vita e Pensiero, 1998, pp. 301-344; H. Cavallera, *La pedagogia cristiana tra le due guerre: il confronto con l'idealismo*, in *La pedagogia cristiana nel Novecento tra critica e progetto, XXXVIII Convegno di Scholé*, Brescia, La Scuola, 2000, pp. 81-132; G. Chiosso, *Profilo storico della pedagogia cristiana in Italia (XIX e XX secolo)*, Brescia, La Scuola, 2001, pp. 89-166; Id., *Novecento pedagogico*, Brescia, La Scuola, 2012, pp. 156-162; 171-173.

² Cfr. A. Cova (ed.), *I discorsi di inizio anno da Agostino Gemelli a Adriano Bausola 1921/22-1997/98*, in *Storia dell'Università Cattolica del Sacro Cuore*, 6 vols., Milano, Vita e Pensiero, 2007, vol. I: *Le fonti*; M. Bocci, *L'Università Cattolica nelle carte degli archivi con un repertorio degli studi e delle fonti a stampa a cura di N. Martinelli e S. Riboldi*, in *Storia dell'Università Cattolica del Sacro Cuore*, Milano, Vita e Pensiero, 2008, vol. II: *Le fonti*; M. Bocci (ed.), *Agostino Gemelli e il suo tempo*, in *Storia dell'Università Cattolica del Sacro Cuore*, Milano, Vita e Pensiero, 2009, vol. IV: *Temi, questioni, protagonisti*; A. Carera (ed.), *Per una comunità educante. La formazione e la didattica*, in *Storia dell'Università Cattolica del Sacro Cuore*, Milano, Vita e Pensiero, 2010, vol. IV: *Le istituzioni*.

³ Riguardo alla chiamata di Casotti alla Cattolica, rimandiamo all'interessante racconto dello stesso Casotti, che in un suo breve libretto dedicato al pensiero pedagogico del Gemelli descrisse il suo primo incontro con il francescano, avvenuto poco dopo la conversione dell'ex gentiliano al cattolicesimo. In seguito ad una riunione al Magistero di Torino, Casotti trovò il tempo per confessare al Gemelli «le nuove condizioni» del suo pensiero. Gemelli, commosso per l'inaspettata notizia, gli fissò un appuntamento per lo stesso pomeriggio in un «caffeuccio» di Piazza Castello. «Dopo che il Padre mi ebbe parlato a lungo di sé – raccontò Casotti – il discorso era caduto su tante cose diverse; fra l'altro anche sulla cattedra di pedagogia allora vacante all'Università Cattolica. – E perché non viene con noi? – mi disse semplicemente padre Gemelli. Ed io, alzatomi, lo seguii. E, per trentasei anni, quella è stata la mia strada». Cfr. M. Casotti, *Il pensiero pedagogico di Padre Gemelli*, Milano, Vita e Pensiero, 1961, p. 44.

⁴ C. Scurati, *Profili nell'educazione. Ideali e modelli pedagogici nel pensiero contemporaneo*, Milano, Vita e Pensiero, 1991, p. 78.

A questi due avvenimenti se ne può aggiungere un terzo, seppur di poco precedente a quelli citati, vale a dire la pubblicazione da parte di Francesco Olgiati dei *Primi lineamenti di pedagogia cristiana* (1923)⁵. Si tratta di un saggio «programmatico», nel quale il sacerdote esortò i cattolici ad impegnarsi nella riflessione educativa, ambito che era stato, a suo dire, tralasciato nei decenni precedenti⁶.

Se la combinazione di queste circostanze fu decisiva per la fortunata irruzione della pedagogia neoscolastica nello scenario italiano, la genesi della sua elaborazione, lasciata perlopiù in ombra dalla storiografia, risale ad un periodo ben precedente. Sin dai suoi esordi, infatti, il gruppo gemelliano indirizzò la sua missione culturale occupandosi anche di questioni educative e scolastiche, attraverso una serie di approfondimenti, dibattiti, ricerche, iniziative e pubblicazioni.

L'obiettivo del presente articolo è quello di lumeggiarne, al fine di preparare ulteriori e più approfonditi lavori, l'iniziale interesse pedagogico, utilizzando come fonte privilegiata i fascicoli della «Rivista di Filosofia Neo-Scolastica», principale organo del gruppo milanese. Saranno presi in esame i settantadue numeri pubblicati tra il 1909, anno della sua fondazione, e il 1923, *termine ad quem* per le ragioni già esposte. Si tratta di un materiale di grande interesse per indagare il primo sviluppo della riflessione educativa neoscolastica, i temi sui quali catalizzò l'attenzione, i legami con gli altri circuiti di area cattolica, la linea di interpretazione adottata nei confronti delle correnti coeve, se e in che misura si occupò del dibattito scolastico.

1. Origini e struttura del periodico

Nella storia del pensiero filosofico e pedagogico italiano del Novecento, la «Rivista di Filosofia Neo-Scolastica» ha rappresentato una tra le realtà più importanti e incisive del mondo cattolico⁷, divenendo «un crogiolo, un filtro,

⁵ F. Olgiati, *Primi lineamenti di pedagogia cristiana*, Milano, Vita e Pensiero, 1924.

⁶ «I cattolici italiani, dimentichi delle gloriose tradizioni della pedagogia cristiana nel nostro Paese, hanno avuto in questi ultimi decenni una così criminosa negligenza per i problemi pedagogici, che anche le mie pagine modeste, con tutti i loro difetti ed il loro carattere voluto di semplicità e di linee elementari, potranno forse non essere completamente inutili» *ibid.*, p. 9.

⁷ Sulla storia della rivista di vedano: M. Mangiagalli, *La "Rivista di Filosofia neo-scolastica" (1909-1959)*, Milano, Vita e Pensiero, 1991, vol. II; M. Lenoci, «*Rivista di Filosofia neo-scolastica*». *Filosofia classica e dialogo con la modernità*, in P. Di Giovanni (ed.), *La cultura filosofica italiana attraverso le riviste, 1945-2000*, Milano, FrancoAngeli, 2005, pp. 249-276; S. Pietroforte, *La Scuola di Milano. Le origini della neoscolastica italiana (1909-1923)*, Bologna, il Mulino, 2005; M. Sina, *La Facoltà filosofica dell'Università Cattolica*, in A. Viano, P. Rossi (edd.), *Le città filosofiche. Per una geografia della cultura filosofica del '900*, Bologna, il Mulino, 2005, pp. 105-137; *Atti del Convegno commemorativo del centenario. Milano 27-28 gennaio 2009*,

una vetrina di idee che hanno avuto uno spessore notevole, e anche un buon riconoscimento nella cultura italiana, e non solo in essa»⁸.

Il periodico esordì nel gennaio del 1909 sotto la guida dei due segretari Agostino Gemelli e Giulio Cannella. Il primo, dopo una formazione tutt'altro che cattolica (padre massone, formazione medica orientata al positivismo, haeckeliano convinto, direttore del giornale turatiano «La Plebe») nel 1903 abbracciò la fede cattolica. Lasciato il laboratorio del futuro premio Nobel Camillo Golgi, dove aveva iniziato una brillante carriera da ricercatore in ambito embriologico e istologico, fu professato frate francescano dei minori nel 1907, per poi essere ordinato sacerdote l'anno seguente⁹.

Alla guida della rivista fu affiancato da Giulio Canella, allora insegnante di pedagogia e morale della scuola Normale di Verona. Lo studioso, che diede un contributo fondamentale per alimentare gli interessi del periodico in senso educativo e scolastico¹⁰, fu molto attivo anche in ambito politico e associazionistico: presidente della «Nicola Mazza», sezione veronese dell'Associazione magistrale cattolica «Nicolò Tommaseo», ne diresse il periodico «Poca Favilla». Nell'ottobre del 1910, il Cannella lasciò la direzione della «Rivista di Filosofia Neo-Scolastica» per divergenze con la linea redazionale preferita dal Gemelli.

La pubblicazione della rivista fu dapprima curata dalla Libreria Editrice Fiorentina, poi dalla Società italiana per gli studi filosofici e psicologici, ed infine, dal 1922, dalla Facoltà filosofica dell'Università Cattolica del Sacro Cuore, di cui il periodico aveva preparato la nascita negli anni precedenti, rappresentando, come si è scritto, il suo «zigote»¹¹. Non a caso, attorno alla redazione si raccolsero molti di quegli intellettuali destinati a diventare i primi docenti della Facoltà di Filosofia con cui, assieme a quella di Scienze Sociali, il nuovo ateneo milanese aprì i battenti nel dicembre del 1921, con l'intento di costruire una «comunità di studenti» da educare nella visione etica e scientifica¹².

«Rivista di Filosofia Neo-Scolastica» [d'ora in poi RFNS], nn. 1-3, 2009, pp. 1-442. M. Bocci (ed.), *Agostino Gemelli e il suo tempo: atti del Convegno storico Nel cuore della realtà: Agostino Gemelli e il suo tempo*, Milano, Vita e Pensiero, 2009.

⁸ A. Bausola, *Presentazione*, in Mangiagalli, *La "Rivista di Filosofia neo-scolastica" (1909-1959)*, cit., vol. I, p. 10.

⁹ Sulla figura di Agostino Gemelli si vedano: G. Chiosso, *Mario Casotti storico della pedagogia*, «Pedagogia e vita», n. 2, 1992, pp. 67-89; L. Caimi, *Il «Paedagogium»: l'Istituto per gli studi sulla educazione cristiana costituito presso l'Università Cattolica del Sacro Cuore (1942-55)*, «Annali di storia dell'educazione», n. 2, 1995, pp. 237-271; Cova (ed.), *I discorsi di inizio anno da Agostino Gemelli a Adriano Bausola 1921/22-1997/98*, cit.; Bocci (ed.), *Agostino Gemelli e il suo tempo*, cit.; Carera, *La «comunità educante». Profilo educativo e didattico*, cit., pp. 3-164; Id., *Gemelli Agostino*, in G. Chiosso, R. Sani (edd), *Dizionario biografico dell'educazione*, 2 vols., Milano, Bibliografica, 2013, vol. I, pp. 628-629.

¹⁰ *Ibid.*, vol. I, p. 85. Sul Canella si veda il profilo biografico curato da Fabio Targhetta in Chiosso, Sani (edd.), *Dizionario biografico dell'educazione*, cit., vol. I, p. 257.

¹¹ E. Franceschini, *Uomini e fatti dell'Università Cattolica*, Padova, Antenore, 1984, p. 189.

¹² Recentemente è stato affermato che per Gemelli l'Università Cattolica rappresentasse «a sort

Sul piano dei contenuti, nella forma editoriale e perfino nel titolo, il periodico si ispirò alla «Revue Néo-Scolastique de Philosophie», avviata nel 1894 dal futuro cardinale Desiré Mercier, definito sul primo numero della rivista milanese come il «fondatore della nostra scuola»¹³. La sua figura e l'intero circuito lovaniese rimasero per Gemelli e la redazione un costante punto di riferimento, sebbene con gli anni si poté assistere ad una più originale caratterizzazione sia per una diversa posizione assunta su alcune tematiche fondanti (come la questione criteriologica) sia per l'inevitabile assimilazione del periodico milanese al contesto filosofico e culturale italiano.

Nel 1909 la «Rivista di Filosofia Neo-Scolastica» uscì con quattro numeri, mentre dal 1910, dopo un apposito «referendum» tra i lettori, passò ad una cadenza bimestrale (con cinque o sei numeri all'anno), per poi tornare, dal 1972, un trimestrale. Ogni fascicolo era composto da un primo gruppo di saggi più corposi e approfonditi, cui seguivano una serie di rubriche pressoché stabili: in «Note e discussioni» erano presentati altri articoli più brevi, nelle «Analisi d'opere e cenni bibliografici» e nelle «Note bibliografiche» si proponevano recensioni di monografie riguardanti svariati argomenti (dalla Teologia naturale alla Psicologia, dalla Pedagogia alla Storia della Filosofia); la «Rivista delle riviste» (poi sostituita da «Tra libri e Riviste») segnalava alcune novità editoriali ed esponeva le sintesi di alcuni articoli pubblicati in altri periodici; la «Tribuna libera», invece, era riservata agli interventi dei lettori. Ogni fascicolo presentava infine un «Notiziario», a volte sostituito dalla rubrica «Notizie», nel quale erano riportate numerose informazioni legate al dibattito filosofico, psicologico e pedagogico, ma anche notizie dal mondo accademico italiano ed estero. La rivista si concludeva con eventuali necrologi. Dall'aprile del 1909 fu allegato il «Sommario ideologico delle opere e delle riviste di filosofia», in cui venivano elencate, con una specifica classificazione, monografie e articoli pubblicati su argomenti filosofici e di «scienze affini».

of «community of scholars» that would systematically meet to discuss and exchange information about research conducted and results obtained, without however overlooking their commitment to teaching and training, aimed at establishing a direct and personal «soul to soul» relationship with students, who, apart from being guided in their cultural and academic education and trained with a view to their future professions, would experience opportunities for personal growth and the development of their religious and civil conscience» (R. Sani, L. Pomante, *From Agostino Gemelli to Adriano Bausola. Notes on a monumental History of the Catholic University of the Sacred Heart*, «History of Education & Children's Literature», n. 2, 2011, p. 460).

¹³ *Il nostro programma*, «RFNS», n. 1, 1909, p. 17.

2. *Una rivista pedagogica?*

Se nell'articolo programmatico del 13 gennaio 1909 non si trova alcun riferimento a questioni strettamente educative e scolastiche¹⁴, basta sfogliare i primi fascicoli per riscontrare la grande attenzione del gruppo gemelliano per la pedagogia. Si tratta di un interesse che la rivista approfondì non solo con alcuni saggi dal forte impianto teorico, ma anche attraverso numerose recensioni di monografie e articoli (compresi quelli più divulgativi)¹⁵, seguendo il dibattito pubblicistico e l'attività accademica, segnalando celebrazioni, congressi e iniziative varie.

Alla base di questo impegno si può rintracciare la convinzione che, specularmente al campo filosofico, fosse il tempo di riorganizzare il fronte pedagogico cattolico attorno ad una riflessione educativa di impianto realistico-tomista, in grado di confrontarsi con le tematiche allora più sentite nello scenario educativo e scolastico. A riguardo, merita di essere citata una emblematica iniziativa lanciata nel secondo numero del 1911: si tratta di un concorso volto alla pubblicazione di un manuale di pedagogia ispirato alla visione cristiana dell'educazione, ma anche attento «a tutte le legittime esigenze degli odierni studi pedagogici, tenuto conto pure delle conquiste che, nel campo della pedagogia sperimentale e della psicologia, si sono compiute»¹⁶. Tra gli altri, il progetto fu sostenuto da Papa Pio X con un assegno di 500 lire¹⁷. Il termine ultimo della presentazione dei manoscritti fu fissato per l'1 maggio 1912, ma poi posticipato per dare maggior tempo ai partecipanti¹⁸. Se il progetto non andò avanti (nessuna notizia del suo esito si trova nei fascicoli successivi), non certo si interruppe l'impegno pedagogico del periodico.

Oltre al confronto con le più importanti personalità delle correnti laiche, di cui si dirà dopo, la «Rivista di Filosofia Neo-Scolastica» orientò la sua attenzione, soprattutto in una fase iniziale, verso alcuni studiosi cattolici già affermati.

In questa direzione diede spazio alle opere di Giuseppe Allievo, docente all'Università di Torino e principale esponente della pedagogia cattolica italiana tra Otto e Novecento. Il nome dello studioso vercellese appare per la prima volta nel 1910, quando fu segnalata l'«ottima» prolusione intitolata «La teorica della scienza in servizio della pedagogia e della cultura degli ingegni»¹⁹

¹⁴ *Ibid.*, pp. 3-22.

¹⁵ Cfr.: *Notiziario*, «RFNS», n. 1, 1910, p. 124; L. Trivulzio, *P. Didon, L'educazione presente*, «RFNS», nn. 4-5, p. 570; G. Bonomelli, *Questioni morali del giorno*, «RFNS», nn. 4-5, 1910, p. 570; J. Fonsagrives, *L'educazione della purezza. Consigli ai genitori e ai maestri*, «RFNS», nn. 3-4, 1911, pp. 470-471; O. Roux, T. Falcini, *Per l'Educazione*, «RFNS», n. 6, 1911, p. 736; A. Alessandrini, D. Bassi, *Noi: saggi di Educazione personale*, «RFNS», n. 5, 1912, pp. 676-680.

¹⁶ *Concorso per un manuale di pedagogia*, «RFNS», n. 2, 1911, pp. 165-166.

¹⁷ *Ibid.*, p. 165.

¹⁸ Cfr. *Il nostro concorso per un manuale di pedagogia*, «RFNS», n. 2, 1912, p. 320.

¹⁹ *Notiziario*, «RFNS», n. 1, 1910, p. 122.

e pubblicata su «Studium». Nel fascicolo seguente Giulio Canella recensì gli *Opuscoli pedagogici editi e inediti* (1909), sostenendo che l'Allievo non fosse stato ancora «conosciuto ed apprezzato abbastanza»²⁰. Dopo aver dato un certo spazio ad alcune velenose polemiche tra Allievo e il prof. D'Ercole²¹, la rivista commentò l'opera *Gian Giacomo Rousseau filosofo e pedagogista* (1910)²² e segnalò poi un lavoro di Giovanni Battista Gerini a lui dedicato²³. Nel primo fascicolo del 1911 riportò una prolusione letta da Allievo all'Università di Torino, ed intitolata «Il ritorno alle idee madri del sapere umano»²⁴. Quando soli due anni dopo il pedagogista vercellese lasciò questo mondo, il periodico lo omaggiò con un commosso necrologio²⁵. Il suo nome comparve ancora nel primo fascicolo del 1914, con la recensione del volume postumo *La psicologia di Herbert Spencer*²⁶, opera che secondo la redazione confermò «l'attualità delle opere dell'Allievo», definito «illustre ed indimenticabile Maestro».

La rivista si mostrò molto sensibile anche ai contributi stranieri, in linea con un atteggiamento tipico del gruppo neoscolastico. Non è un caso se, alla fine del 1909, interrogato da Pio X su come il Vaticano potesse sostenere il suo progetto, Agostino Gemelli chiese a Papa Sarto un sostegno economico per «prendere un giovane volenteroso e spesarlo perché andasse all'estero, a studiare pedagogia»²⁷. Uno dei primi autori stranieri valorizzati fu il padre domenicano Martin Gillet, personalità di primo piano della neoscolastica francese. Nel 1910, il periodico recensì *L'educazione del cuore*²⁸, l'anno seguente propose in anteprima un capitolo de *La valeur éducative de la morale chrétienne*²⁹, un saggio pubblicato poco dalla casa editrice Firmin-Didot di Parigi e tradotto in Italia solo nel 1930.

²⁰ «Non consentiremo in qualche parte delle sue dottrine filosofiche e pedagogiche; non consentiremo neppure in alcune sue idee di pratica educativa; ma è certo che molti e preziosi concetti l'Allievo ha apportati alla pedagogia. Lasciando da parte le sue critiche storiche, acute, precise, e bene spesso pregevolissime, io credo, per es., che la sua idea fondamentale pedagogica dell'educazione della personalità meriti molta considerazione e racchiuda in sé il nucleo vero, intorno a cui si deve aggirare una dottrina pedagogica. E così si può dire di molte sue opinioni sui problemi pratici, dove tanta confusione regna oggi, e dove l'Allievo ha già designato soluzioni assai giuste» G. Canella, *Opuscoli pedagogici inediti ed editi di Giuseppe Allievo*, «RFNS», n. 2, 1910, pp. 208-209.

²¹ *A proposito dell'insegnamento filosofico e pedagogico del professor Giuseppe Allievo*, «RFNS», n. 6, 1910, p. 683; *Ancora a proposito dell'insegnamento pedagogico e filosofico*, «RFNS», n. 2, 1911, pp. 258-260; *Una lettera del Prof. D'Ercole*, «RFNS», n. 5, 1911, p. 576.

²² M. Brusadelli, *Gian Giacomo Rousseau filosofo e pedagogista*, «RFNS», n. 5, 1911, pp. 591-592.

²³ *Tra riviste e libri*, «RFNS», n. 6, 1910, p. 712.

²⁴ G. Allievo, *Il ritorno alle idee madri del sapere umano*, «RFNS», n. 1, 1911, pp. 15-23.

²⁵ *Necrologio*, «RFNS», n. 4, 1913, pp. 456-457.

²⁶ G. Allievo, *La psicologia di Herbert Spencer*, «RFNS», n. 1, 1914, p. 89.

²⁷ Casotti, *Il pensiero pedagogico di Padre Gemelli*, cit., p. 28.

²⁸ F. Palhoriés, P. Gillet, *L'Éducation du Coeur*, «RFNS», n. 6, 1910, p. 688.

²⁹ M.S. Gillet, *Sul fondamento della realtà morale*, «RFNS», n. 2, 1911, pp. 196-211.

Con il passare degli anni, l'impegno pedagogico del periodico coinvolse sempre più direttamente alcune personalità di spicco del sodalizio animato da padre Gemelli. Alla fine degli anni Dieci, Francesco Olgiati iniziò ad occuparsi maggiormente di questioni educative, un interesse che si sarebbe poi tradotto in una serie di monografie uscite in quegli anni³⁰. Si tratta di una scelta che fu esplicitata proprio sulle pagine del periodico. Nel commento ad un fortunato libro di Alfred Fouillée³¹, Olgiati espresse la volontà di illustrare la sua teoria pedagogica in un volume di prossima pubblicazione³². Nello stesso fascicolo, apparve poi un interessante resoconto di una adunata della Società per gli studi filosofici e psicologici, sodalizio che raccolse la redazione della rivista e preparò la nascita dell'Università Cattolica, nella quale Olgiati svolse una lezione dal titolo «La natura della pedagogia»³³.

Lo studioso lombardo continuò ad occuparsi di questioni educative con una serie di recensioni. Sempre nel 1919 commentò il saggio di Frédéric Queyrat intitolato *L'émulation et son rôle dans l'éducation. Étude de psychologie appliquée* (1919)³⁴ e nel 1921 recensì il saggio di Mariano Maresca, *La pedagogia sta da sé?*³⁵, avanzando una sua soluzione alla dibattutissima questione dei rapporti tra la pedagogia e le altre scienze, vale a dire «la riduzione della pedagogia alla religione». Nel fascicolo seguente si occupò del libro pubblicato dallo studioso salesiano Vincenzo Cimatti, ed intitolato *Lezioni di pedagogia per uso delle scuole normali secondo i programmi governativi* (1920)³⁶.

³⁰ Oltre ai *Primi lineamenti di pedagogia cristiana* (1923), in quegli anni pubblicò: *I nostri giovani e la purezza. Brani di vita ed esperienze personali* (1918), *I nuovi orizzonti della gioventù femminile* (1919) e *Le battaglie dei giovani* (1926).

³¹ F. Olgiati, L. Ventura, *La concezione nazionale dell'educazione secondo A. Fouillée*, «RFNS», n. 1, 1919, pp. 92-94.

³² Concludendo l'articolo osservò: «Non la finirei più, se volessi proseguire la critica; sarebbe necessario che io esponessi una mia teoria dell'educazione; e ciò non è possibile in una recensione. Ma lo farò presto, spero; senza tuttavia tener gran conto delle idee di Fouillée, perché esse, dal punto di vista filosofico, valgono ben poco» *ibid.*, p. 94.

³³ «Prese in seguito la parola F. Olgiati per svolgere la sua relazione intorno al tema: La natura della pedagogia. Espose le teorie positivistiche ed accennata la concezione herbartiana della pedagogia, dopo di essersi soffermato sulla tesi idealistica che riduce la pedagogia alla filosofia, il relatore propone la sua teoria: la riduzione cioè della pedagogia alla religione. Un dibattito vivissimo si accende intorno alle idee del relatore; P. Chiocchetti (presente alla seduta e salutato da tutti con entusiasmo affettuoso), il Dott. Necchi, P. Gemelli, il Dott. Marzorati, il Prof. Zanoni, Padovani, Franceschini ed altri interloquiscono. È da notarsi che questa seduta intorno ad una questione d'indole pedagogica sarà la prima di numerose altre. Fra qualche settimana P. Chiocchetti svolgerà il tema La pedagogia di S. Agostino» *Notiziario*, «RFNS», n. 1, 1919, p. 96.

³⁴ F. Olgiati, *L'émulation et son rôle dans l'éducation. Étude de psychologie appliquée*, *Bibliothèque de philosophie contemporaine*, «RFNS», n. 6, 1919, pp. 629-630.

³⁵ Id., M. Maresca, *La pedagogia sta da sé?*, «RFNS», n. 1, 1921, pp. 73-75.

³⁶ Id., V. Cimatti, *Lezioni di pedagogia per uso delle scuole normali secondo i programmi governativi*, «RFNS», n. 2, 1921, pp. 75-76.

3. Tra positivismo, idealismo e realismo spiritualistico

Alla maturazione della scuola pedagogica neoscolastica concorse in modo decisivo il confronto con le teorie coeve, condotto attraverso una serie di studi non solo volti ad evidenziarne limiti ed errori, ma anche attenti a valorizzare elementi da poter integrare in una riflessione educativa coerente con la visione cristiana della vita, secondo la logica gemelliana dell'«assimilare» senza «adattarsi».

Quando la rivista iniziò le sue pubblicazioni, lo scenario pedagogico italiano appariva ancora influenzato dal tardo positivismo, che, pur in fase calante, godeva ancora di un certo peso in campo accademico, pubblicistico e nella manualistica scolastica. Il periodico, nato con una forte carica antiscientista, criticò con severa animosità le posizioni pedagogiche ed educative dei suoi maggiori esponenti. A Roberto Ardigò, caposcuola della corrente italiana, dedicò una serie di appunti polemici, arrivando a definirlo come un «fossile»³⁷, senza approfondirne, in realtà, la linea pedagogica. Più spazio fu riservato al pensiero di Saverio De Dominicis, di cui fu recensita l'opera *Scienza comparata dell'educazione. Antropologia pedagogica* (1909)³⁸. Si parlò dell'autore come uno che si lascia «andare a periodi sonori e vuoti», mentre la sua antropologia fu definita «parolaia» e ripetitiva. Un saggio che sarebbe disseminato di «risibili contraddizioni». Con accenti simili, la rivista stroncò poi anche un manuale di Giuseppe Tarozzi rivolto agli studenti delle scuole normali³⁹.

I toni polemici e gli argomenti sbrigativi usati nelle critiche alla pedagogia positivista furono forse dettati anche dalla convinzione che questa corrente fosse ormai al tramonto. Già nei primi anni Dieci erano del resto chiari i segni della sua crisi. Lo stesso Agostino Gemelli, ricordando i dibattiti del Congresso internazionale di Filosofia tenutosi a Bologna nel 1911, parlò di un clima segnato da un «già decaduto positivismo», mentre appariva sempre più in auge il «fiorento idealismo»⁴⁰. Questo riconoscimento portò il periodico a concentrare sempre più l'attenzione, anche sul piano pedagogico, verso la corrente attualistica. Apparvero sulla rivista numerosi e approfonditi articoli, perlopiù dedicati all'attività e alle opere di Giovanni Gentile e, in misura minore, di Giuseppe Lombardo Radice.

Lo studioso siciliano iniziò ad attirare l'attenzione del periodico sin dai primi fascicoli. Nel gennaio del 1910, trattando delle polemiche legate alla mancata elezione a Senatore per censo di Ardigò (a cui fu preferito Croce) la redazione si chiese se quella dell'ex sacerdote potesse essere ancora chiamata filosofia

³⁷ *Notiziario*, «RFNS», n. 1, 1910, p. 127.

³⁸ L. Ventura, S. De Dominicis, *Scienza comparata dell'educazione. Antropologia pedagogica*, «RFNS», n. 5, 1911, pp. 592-596.

³⁹ G. Tarozzi, *Coscienza morale e civile*, «RFNS», n. 1, 1910, p. 107.

⁴⁰ Gemelli, *Il mio contributo alla filosofia neoscolastica*, cit., pp. 27-28.

«dopo gli arguti e vivaci articoli di Gentile nella Critica»⁴¹. Nei numeri seguenti continuò a seguirne l'attività, segnalandone articoli, pubblicazioni e iniziative⁴².

All'inizio del 1913, la rivista annunciò la pubblicazione del *Sommario di pedagogia come scienza filosofica* (1912), definita «un'opera importante della quale dovremo parlare con quella ampiezza che essa si merita»⁴³. La recensione curata da Emilio Chiochetti ne parlò come un «libro profondo, e completo dal punto di vista idealistico»⁴⁴. La prima parte, intitolata «L'Uomo», fu definita «mirabile anche per chi, come noi, non accetta parecchie delle tesi del Gentile». Lo studioso terminò l'articolo con una significativa valutazione: «Noi, che non siamo hegeliani, non possiamo accettare, – ripeto – anzi respingiamo come erronee parecchie delle dottrine gentiliane: tuttavia ammiriamo la struttura di esse nel tutto e in modo speciale quel non so che di sacro nel sentimento e nell'espressione che le vivifica e le solleva nella più pura atmosfera dello spirito. Pare di leggere qua e là uno dei libri sacri delle religioni. Non per gli alunni è fatto questo libro, ma per tutti coloro che sono capaci di sentire la vastità e la serietà dei grandi problemi dello spirito»⁴⁵. Poco tempo dopo, la redazione segnalò la pubblicazione del *Sommario di didattica* (1914)⁴⁶, evidenziandone i temi trattati.

Ma il più sistematico studio sulla pedagogia idealistica apparso sulla rivista milanese si deve a Luigi Borriello, giovane sacerdote napoletano laureato in filosofia all'Università Gregoriana, che nel 1916 pubblicò sul periodico neoscolastico due articoli di grande spessore speculativo *Il problema pedagogico e l'idealismo*⁴⁷ e *La pedagogia di Giovanni Gentile*⁴⁸. Si tratta di un contributo copioso (ben settanta pagine in tutto) che appare di grande interesse per comprendere la posizione del gruppo neoscolastico rispetto alla pedagogia neoidealistica.

Il primo articolo è introdotto da una serie di preliminari riflessioni su alcuni concetti fondativi. Richiamando l'inevitabile legame tra filosofia e pedagogia, asserì come la riflessione educativa non dovesse «perdere di vista l'ideale della vita umana, il quale non è certo un *quid* astratto, ma è reale, quanto reali sono le aspirazioni scientifiche, razionali e religiose, che assillano e tormentano ogni

⁴¹ *Notiziario*, «RFNS», n. 1, 1910, p. 127; *Tra riviste e libri*, «RFNS», n. 6, 1910, p. 715.

⁴² *Tra riviste e libri*, «RFNS», n. 1, 1911, pp. 154-155; *Notiziario*, «RFNS», nn. 3-4, 1911, pp. 484-191; *Tra riviste e libri*, «RFNS», n. 5, 1912, pp. 693-702; *Tra riviste e libri*, «RFNS», n. 4, 1913, pp. 447-450; *Notizie*, «RFNS», nn. 3-4, 1911, p. 486; A. Lantrua, *La filosofia scolastica in Italia*, «RFNS», n. 5, 1911, pp. 562-572.

⁴³ *Tra riviste e libri*, «RFNS», n. 1, 1913, p. 108.

⁴⁴ E. Chiochetti, *Sommario di Pedagogia come scienza filosofica*, «RFNS», n. 4, 1913, p. 444.

⁴⁵ *Ibid.*, p. 445.

⁴⁶ *Notiziario*, «RFNS», n. 1, 1915, p. 103.

⁴⁷ L. Borriello, *Il problema pedagogico e l'idealismo*, «RFNS», n. 4, 1916, pp. 337-356.

⁴⁸ *Id.*, *La pedagogia di Giovanni Gentile*, «RFNS», n. 5, 1916, pp. 433-454; n. 6, 1916, pp. 529-554.

mente, ogni cuore»⁴⁹. In questo senso, criticò fortemente la riduzione dell'uomo alla sola dimensione materiale⁵⁰, che sul piano pedagogico aveva condotto a spezzettare l'intervento formativo, perdendone l'unità. A riguardo valorizzò l'impegno di autori come Guido Della Valle, Giovanni Calò, Giovanni Vidari, Antonio Colozza, «i quali, pur rimanendo sostenitori dell'indirizzo sperimentale in pedagogia, fanno degli sforzi poderosi per superare il positivismo, onde rivendicare all'uomo quei caratteri spirituali di libertà e spontaneità, negati da un indirizzo pedagogico strettamente meccanico»⁵¹. Ma secondo Borriello, il più efficace sforzo per «battere in breccia» il positivismo si doveva alla corrente idealistica, di cui Giovanni Gentile rappresentava il «legislatore» e Giuseppe Lombardo Radice «l'apostolo».

Borriello analizzò con dettagliati riferimenti le posizioni pedagogiche gentiliane: oltre a lumeggiarne alcuni concetti chiave come l'autocitisi, l'atto puro, il concetto di storia, si soffermò sulla stessa idea di educazione, così sintetizzata: «Lavorare in eterno al proprio essere! In questa frase è precisato, rigorosamente, il carattere e il programma di tutta la pedagogia gentiliana, quale scienza della formazione dello spirito. Perché il carattere dell'uomo, riflette il Gentile, non è dato dalla sua animalità, ma dalla sua umanità, che l'essere suo è lo spirito»⁵². La risoluzione della pedagogia nella filosofia fu invece spiegata come l'impossibilità a «distinguere lo sviluppo dello spirito, oggetto della filosofia, dall'educazione dello spirito, oggetto della pedagogia».

Se Borriello apprezzò le pagine dedicate da Gentile all'«opera del maestro», scrivendo che meriterebbero di essere meditate da certi insegnanti «per l'onore della scuola, e per lo stesso loro amor proprio di Maestri!»⁵³, invitò tuttavia i suoi lettori a non fermarsi alla «facciata dell'edificio» idealistico, pur bella e attraente, ma ad esaminarne in profondità le fondamenta⁵⁴, che a suo giudizio, compromettevano le posizioni pedagogiche degli attualisti, distorcendone l'idea di educazione.

In prima istanza, Borriello lamentò la spersonalizzazione della relazione formativa perorata dai neoidealisti non solo per evitare l'individualismo, ma anche per rimanere coerenti con la loro visione gnoseologica. «Noi – sostenne – rifiutiamo tanto la tesi empirica, la quale riduce la pedagogia ad una tecnica, quanto la tesi idealistica della indistinzione assoluta dell'educazione»⁵⁵. In questo senso, demarcò con forza l'inevitabile discordanza tra una concezione

⁴⁹ Borriello, *Il problema pedagogico e l'idealismo*, cit., p. 340.

⁵⁰ «Che cosa è l'uomo, secondo la filosofia positiva e naturalistica, in genere? Non altro che un complicato organismo, nel quale, la coscienza e lo spirito, sono un epifenomeno, una realtà punto spirituale, mera risultante del mondo esterno, e le cui attività naturali bisogna favorire con l'azione puramente estrinseca» *ibid.*, p. 341.

⁵¹ *Ibid.*, p. 342.

⁵² Borriello, *La pedagogia di Giovanni Gentile*, cit., p. 447.

⁵³ *Ibid.*, p. 453.

⁵⁴ *Ibid.*, p. 544.

⁵⁵ *Ibid.*, p. 550.

dell'educazione neoscolastica e una idealistica: «L'educazione – scrisse – realizza, effettivamente, lo spirito, non nel senso di costituzione ex integro dello spirito stesso, ma nel senso di svolgimento ed affermazione della personalità umana, in rapporto alla pienezza del pensiero storico, come mezzo e in rapporto a Dio, come fine del proprio operare, principio del proprio essere, ragione formale di tutte le cose. Così si fanno chiari i rapporti della pedagogia, oltre che con la filosofia, anche con la religione. Sicuro, e lo ammette anche il Gentile, l'angolo visuale dell'educazione è Dio; ma, per noi, l'educazione dell'uomo non è, come nell'idealismo attuale, l'educazione di un Dio, ma è l'educazione per Dio»⁵⁶.

Nell'intervento di Borriello colpisce la formulazione del concetto di educazione, definita come «un'arte, nel senso più elevato della parola, appunto perché il suo scopo, nel formar l'uomo, è attuare, realizzare, incarnare nell'uomo l'ideale che il pensiero ha scoperto e vuol raggiungere, e farne pane quotidiano della vita»⁵⁷. Si tratta di una spiegazione destinata ad avere grande fortuna nella pedagogia neoscolastica successiva.

Dopo questi due pregevoli lavori sul pensiero educativo neoidealistico, Borriello pubblicò una recensione del volume di Giovanni Vidari, *Elementi di pedagogia*⁵⁸, e poi altri due articoli⁵⁹. Ma la collaborazione del promettente studioso si interruppe di lì a poco: ammalatosi di tubercolosi morì nel 1918 a soli trent'anni. Dalla redazione fu ricordato con un toccante necrologio⁶⁰.

A lato di Gentile, il periodico seguì anche l'attività di Giuseppe Lombardo Radice, definito un «neohegeliano studioso e colto»⁶¹. Dello studioso siciliano fu valorizzata l'idea «di celebrare il valore dell'iniziativa privata nel campo della cultura»⁶², ma anche le sue posizioni circa l'identità di pedagogia e filosofia. Furono poi apprezzate alcune collane pedagogiche da lui dirette⁶³.

Oltre all'idealismo e al positivismo, la rivista accordò poi una certa attenzione allo «spiritualismo realistico» di Francesco De Sarlo e Giovanni Calò. Dei due fu per primo recensito *La patologia mentale in rapporto all'Etica e al Diritto* (1904)⁶⁴, stimato per la capacità di critica alla scuola criminologica

⁵⁶ *Ibid.*, p. 554.

⁵⁷ *Ibid.*

⁵⁸ G. Vidari, *Elementi di pedagogia: vol. 1. I dati della pedagogia*, «RFNS», n. 5, 1916, pp. 522-526.

⁵⁹ *La filosofia della contingenza*, «RFNS», n. 2, 1917, pp. 121-136; Id., *La metafisica di Emilio Boutroux*, «RFNS», n. 3, 1917, pp. 231-247.

⁶⁰ «RFNS», n. 2, 1918, p. 240.

⁶¹ *Tra riviste e libri*, «RFNS», n. 1, 1913, p. 99.

⁶² Nella questione dell'iniziativa privata nel campo della cultura, noi abbiamo una concezione più ampia ancora del Lombardo-Radice, poiché siamo avversari implacabili di ogni monopolio di Stato, anche riguardo alle scuole elementari e secondarie. Raccomandiamo infine ai nostri amici di studiare seriamente la tesi che identifica la pedagogia con la filosofia» *ibid.* p. 102.

⁶³ *Tra riviste e libri*, «RFNS», n. 2, 1914, p. 186; *Cronaca del movimento filosofico*, «RFNS», n. 4-5, 1914, p. 466.

⁶⁴ «Essa è una dimostrazione efficace della insufficienza delle conclusioni cui questi era arrivato, ed una affermazione elevata in favore della libertà umana. [...] Mentre il Gemelli aveva

torinese. Del De Sarlo furono poi approfonditi alcuni altri lavori, come le *Indagini moderne* (1916)⁶⁵, parzialmente criticato per alcune imprecisioni sul piano storico-filosofico, e *Psicologia e filosofia. Studi e ricerche* (1918), con una recensione curata direttamente da Agostino Gemelli⁶⁶, il quale non solo sottolineò la vicinanza del pensiero desarliano a quello neoscolastico, ma lo incoraggiò, nonostante alcune critiche, a proseguire nelle sue ricerche⁶⁷.

La rivista seguì anche l'opera di Giovanni Calò, figura centrale nella pedagogia primo novecentesca, che dopo un «eclettico» percorso, si avvicinò dalla fine degli anni Trenta alla corrente cattolica⁶⁸. Nella recensione curata da Emilio Chiocchetti sul volume *Fatti e problemi del mondo educativo* (1911)⁶⁹, non è difficile intravedere la stima per l'autore e l'attenzione per il periodico «Cultura filosofica». Lo studioso neoscolastico vagliò alcune posizioni espresse nel libro, affrontando in special modo il tema dell'identità della scienza pedagogica nei suoi rapporti con le altre discipline, questione sulla quale in quegli anni Calò ingaggiò, come noto, una dura polemica con Gentile e la sua scuola⁷⁰. Si tratta di una questione rispetto alla quale, almeno in questa recensione, Chiocchetti optò per la soluzione idealistica⁷¹.

4. Per una pedagogia sperimentale

In linea con il percorso gemelliano e l'impostazione neoscolastica, la rivista valorizzò, fin dai primi numeri, il contributo della ricerca sperimentale per la riflessione educativa, configurando una concezione della pedagogia capace

fatto la critica dei postulati scientifici della dottrina Lombrosiana esaminandola nel suo sviluppo storico e nel valore dei postulati delle scienze biologiche, qui invece abbiamo la critica filosofica della medesima dottrina» M. Brusadelli, *F. De Sarlo, G. Calò, La patologia mentale in rapporto all'Etica e al Diritto*, «RFNS», n. 2, 1909, pp. 342-343.

⁶⁵ L. Bianchi, *Francesco De Sarlo e la filosofia contemporanea*, «RFNS», n. 1, 1917, pp. 102-107.

⁶⁶ A. Gemelli, *F. De Sarlo, Psicologia e filosofia. Studi e ricerche*, «RFNS», n. 4, 1918, pp. 368-370.

⁶⁷ «In queste critiche, l'autore vedrà, speriamo, una testimonianza della ammirazione che noi abbiamo per lui. La lode alla efficacia dell'insegnamento che egli continua con questa opera, la lode per la bontà della difesa delle dottrine che abbiamo in comune con lui, non può che essere resa più accetta ai nostri lettori da questa sincerità di critiche sulla forma. E terminiamo con l'angario che poiché la Cultura filosofica diretta dal De Sarlo ha dato modo a lui di scrivere la più gran parte dei lavori contenuti in questo volume, essa possa riprendere ben presto le sue pubblicazioni e apportare al movimento filosofico italiano il prezioso contributo del filosofo di Firenze e dei suoi numerosi allievi» *Ibid.*, p. 370.

⁶⁸ Si veda il libro di E. Scaglia *Giovanni Calò nella pedagogia italiana del '900*, Brescia, La Scuola, 2013.

⁶⁹ E.C., *G. Calò, Fatti e problemi del mondo educativo*, «RFNS», n. 2, 1912, pp. 298-300.

⁷⁰ Cfr. Scaglia, *Giovanni Calò nella pedagogia italiana del '900*, cit., pp. 29-47.

⁷¹ «Messo tra il Calò o il Gentile – poiché la teoria positivista non merita che se ne tenga conto – io sto col Gentile nella negazione del carattere di scienza speciale dello spirito alla pedagogia» *ibid.*, p. 300.

di conciliare l'interpretazione filosofica con l'apporto delle nuove scoperte psicologiche, considerate necessarie per affinare le pratiche didattiche ed educative. Già nel 1910, Giulio Canella recensì il libro di Maria Montessori *Il metodo della pedagogia scientifica applicato all'educazione nelle case dei bambini* (1909)⁷². Nonostante alcuni appunti critici legati alla formazione etica dei bambini, sostenne che la pubblicazione portasse un «indiscutibile vantaggio», poiché aveva «saputo seguire uno dei postulati fondamentali di metodo della pedagogia scientifica, voglio dire l'osservazione completa e disinteressata della vita dell'educando».

L'anno seguente fu poi lo stesso Gemelli a recensire *La psicologia del fanciullo normale ed anormale con speciale riguardo alla educazione* (1910) di Emilia Formigginì Santamaria⁷³, osservando che «da tempo si sentiva in Italia il bisogno di un volume che esponesse criticamente i risultati della psicologia sperimentale ad uso degli educatori». Aggiunse che conteneva «un materiale prezioso che tornerà soprattutto utile ai maestri nei quali una conoscenza della psicologia sperimentale tornerà certamente fruttuosa». Gemelli mosse però anche una serie di critiche. In primo luogo non condivise la scelta dell'autrice di separare lo studio della psicologia dei «normali» da quella degli «anormali», e poi lamentò una «grave lacuna» nello «studio delle facoltà che comunemente vengono dette superiori, come, ad esempio, il giudizio, il pensiero, tatto volitivo, ecc». Nella conclusione prospettò alcuni suggerimenti emendativi per un'eventuale seconda edizione⁷⁴.

Sullo stesso tema, la rivista pubblicò poco dopo un articolo di Guido Della Valle, allora professore di pedagogia nella scuola normale femminile di Torino e in procinto di passare all'Università di Messina. Nel saggio, intitolato *La pedagogia sperimentale*⁷⁵, il giovane allievo del positivista Nicola Fornelli, proponeva una visione della disciplina capace di conciliare la «teoria speculativa dei fini educativi» con la «scienza sperimentale dei mezzi educativi»⁷⁶. Per

⁷² G. Canella, M. Montessori, *Il metodo della pedagogia scientifica applicato all'educazione nelle case dei bambini*, «RFNS», n. 1, 1910, pp. 100-102.

⁷³ A. Gemelli, *La psicologia del fanciullo normale ed anormale con speciale riguardo alla educazione*, «RFNS», nn. 4-5, 1910, pp. 540-543.

⁷⁴ «Ci auguriamo poi che in una seconda edizione l'autrice voglia corredare la sua opera di tavole, di figure, ecc. Ormai esse sono indispensabili in un libro di psicologia pedagogica. Abbiamo sott'occhi il volume delle Schulze del quale abbiamo già qui parlato e ci sembra degno di essere imitato. Comunque, ad onta di queste lacune e di questi difetti, il libro della signora Formigginì è un libro buono e consigliabile. In tanta penuria di libri di psicologia sperimentale applicata alla pedagogia esso è destinato a fare del bene» *ibid.*, p. 543.

⁷⁵ G. Della Valle, *La pedagogia sperimentale*, «RFNS», n. 1, 1911, pp. 69-91.

⁷⁶ «Bisogna inoltre non perdere mai di vista che non tutte le questioni pedagogiche possono essere trattate sperimentalmente, perché non tutte appartengono all'ambito della ricerca empirica dei fatti. Senza dubbio, rientra sotto il controllo della pedagogia sperimentale tutto ciò che si riferisce all'accertamento dei fatti psicologici ed all'analisi delle forze sinergiche [...] La determinazione dei fini pedagogici resterà quindi sempre riservata alla speculazione filosofica; invece la ricerca dei mezzi più vantaggiosi per conseguire tali fini rientra nell'orbita della conoscenza, dell'osservazione

spiegare la necessità di questi molteplici apporti spiegava: «la psicologia usa l'indicativo, la pedagogia filosofica si vale dell'imperativo e invece la pedagogia sperimentale ricorre al condizionale»⁷⁷. L'articolo appare di grande interesse per confermare la capacità della rivista di valorizzare i punti di convergenza con autori per altri versi molto lontani dalle sue coordinate.

Nel medesimo fascicolo Emilio Chiocchetti si occupò ancora di pedagogia sperimentale, valorizzando l'attività dei neoscolastici tedeschi, ed in particolare di Konstantin Gutberlet⁷⁸. Riprendendone alcune posizioni, lamentò l'abuso del metodo sperimentale, come se da solo potesse risolvere ogni quesito pedagogico, così come la nefanda tendenza di certa psicologia a limitare la capacità intellettuale alla memoria. Pur incoraggiando la ricerca sperimentale e l'affinamento dei metodi, consigliò infine «una grande cautela e moderazione»⁷⁹.

Pochi fascicoli dopo, la rivista ospitò una replica di Fulgenzio Lazzati, futuro vescovo di Mogadiscio, all'articolo su citato di Della Valle⁸⁰. L'autore criticò l'idea dello studioso napoletano secondo cui i valori e le norme riguarderebbero la sfera legata al «sentimento» e non la conoscenza razionale. Ne apprezzò, invece, il tentativo di conciliare la ricerca sperimentale con la filosofia dell'educazione, pur ribadendo la priorità dei fini sui mezzi⁸¹. Sostenne, infatti, che «la formalità di una pedagogia è il fine dell'educazione e il fine non può essere ricercato e determinato che dalla filosofia»⁸².

Il periodico milanese prese in esame anche le opere di alcuni studiosi che sugli stessi temi stavano animando il dibattito europeo nell'orizzonte delle pedagogie dell'attivismo. Già dal 1910, manifestò interesse per l'attività

e dell'esperimento, non può aver luogo coll'intuizione immediata, ma solo per le vie mediate, lunghe, lente, ma sicure della scienza positiva» *ibid.*, p. 77.

⁷⁷ *Ibid.*, p. 82.

⁷⁸ E. Chiocchetti, *Ancora il Philosophisches Jahrbuch*, «RFNS», n. 1, 1911, pp. 144-145.

⁷⁹ «Ciò non vuol dire che si debba rigettare in massa i risultati della psicologia moderna e del metodo sperimentale in pedagogia, ma solo che, nella applicazione di essi, è necessaria una grande cautela e moderazione, una conoscenza minuta del metodo e della portata dei risultati. Finora la psicologia sperimentale in genere e del fanciullo in ispecie non offre risultati così sicuri e copiosi che si possa fondare sopra di essa tutta una nuova pedagogia da sostituirsi alla tradizionale. Entro questi limiti e con queste riserve noi possiamo far buon viso alla giovane scienza, la quale, perfezionando i suoi metodi, e creando un maggior numero di veri competenti nel suo campo, potrà portare notevoli vantaggi alla formazione spirituale dell'uomo» *ibid.*, p. 145.

⁸⁰ F. Lazzati, *Lavoro mentale e pedagogia scientifica*, «RFNS», n. 2, 1911, pp. 247-255.

⁸¹ «Ora io non voglio dire che i cultori della pedagogia debbano chiudere l'uscio in faccia a quelli che si danno pena di far conoscere le leggi raccolte dalla psicologia; non dico che chi vuol determinare le regole educative debba ignorare le leggi dello sviluppo e dell'attività psichica, tutt'altro! Ma dico che, come hanno mostrato le critiche del Wundt, del James e di molti altri autori, non si può fare della vera pedagogia se non quando si valutano i mezzi suggeriti dalle conoscenze psicologiche in funzione dei fini e degli ideali educativi. Che se questi sono tralasciati allora rimaniamo nella pura introduzione alla pedagogia, ossia facciamo della psicotecnica, della psicoenergetica, cose utilissime, senza dubbio, indispensabili anzi alla pedagogia, ma che in nessun caso possono sostituire la pedagogia» *ibid.*, p. 252.

⁸² *Ibid.*, p. 255.

di Édouard Claparède, di cui per primo recensì *Psychologie de l'enfant et Pédagogie expérimentale* (1909), valorizzato per gli apporti dati sul piano della conoscenza psicologica del bambino, ma criticato per la «concezione biologica» non condivisibile del «fatto psichico»⁸³. Sul Claparède, la rivista tornò ancora, occupandosi de *La psychologie animale de Charles Bonnet* (1909)⁸⁴, e poi della traduzione italiana di *Psicologia del fanciullo e pedagogia sperimentale* (1912)⁸⁵.

Negli anni successivi la rivista continuò ad approfondire e commentare la pubblicazione di monografie e ricerche legate alla pedagogia sperimentale⁸⁶, diede notizia di alcuni congressi internazionali, come quello tenuto a Ginevra nel 1922 sull'educazione morale⁸⁷, e incoraggiò alcune importanti iniziative, come il Laboratorio di psicologia sperimentale dell'Università di Roma guidato dal professor Sante De Sanctis⁸⁸, o la fondazione dell'Istituto cattolico per la pedagogia scientifica di Münster in Vestfalia⁸⁹.

5. Interessi scolastici

Nel primo quindicennio della sua attività, la «Rivista di Filosofia Neo-Scolastica» manifestò altresì un certo interesse per alcune questioni legate alla scuola e alla didattica, concentrando l'attenzione sull'insegnamento della filosofia nei licei, tematica approfondita, con una certo eco a livello nazionale, anche dopo il periodo qui considerato⁹⁰.

Già nel primo fascicolo del 1910, la redazione invitò i suoi lettori ad affrontare nella rubrica «Tribuna libera» i vari aspetti relativi all'insegnamento della filosofia, con speciale riguardo ai testi adottati nelle varie scuole italiane⁹¹.

⁸³ E. Claparède, *Psychologie de l'enfant et Pédagogie expérimentale*, «RFNS», n. 1, 1910, p. 105.

⁸⁴ E. Claparède, *La psychologie animale de Charles Bonnet*, «RFNS», n. 3, 1910, p. 346.

⁸⁵ M. Brusadelli, E. Claparède, *Psicologia del fanciullo e pedagogia sperimentale*, «RFNS», n. 1, 1912, pp. 151-152.

⁸⁶ Si vedano per esempio: D. Mercier, *Le origini della psicologia contemporanea*, «RFNS», n. 3, 1910, p. 345; W. Wundt, *Grundzüge der physiol. Psychologie*, «RFNS», nn. 4-5, 1910, p. 565; N. Kostyleff, *La crise de la psychologie expérimentale. Le Présent et l'Avenir*, «RFNS», n. 1, 1911, pp. 124-126; A. Binet, *L'Année Psychologique*, «RFNS», n. 5, 1911, pp. 599-600; *Analisi d'opere*, «RFNS», n. 1, 1916, pp. 115-119; A. Gemelli, U. Saffiotti, *La misura della intelligenza nei fanciulli*, «RFNS», n. 2, 1917, pp. 207-208; A. Gemelli, Hubert Gruender S.J., *Psychology without Soul. A Criticism.*, «RFNS», n. 3, 1917, pp. 288-289.

⁸⁷ *Cronaca del movimento filosofico*, «RFNS», n. 2, 1922, p. 189.

⁸⁸ *Nell'insegnamento universitario*, «RFNS», nn. 4-5, 1910, p. 573.

⁸⁹ *Notiziario*, «RFNS», n. 6, 1922, pp. 503-504.

⁹⁰ Si pensi, per fare solo un esempio, al contributo offerto dalla rivista ai dibattiti scatenati dalla circolare n. 6 del 30 gennaio 1926. Cfr. C. Ghizzoni, *Educazione e scuola all'indomani della Grande Guerra. Il contributo del «La Civiltà Cattolica» (1918-1931)*, Brescia, La Scuola, 1997, pp. 253-257.

⁹¹ *Incominciando il secondo anno di vita*, «RFNS», n. 1, 1910, pp. 3-4.

Nel 1913, commentando «la nuova iniziativa assunta dall' editore Laterza di Bari di pubblicare una collezione di Testi di filosofia per uso dei Licei», sostenne che «se noi abituiamo i nostri studenti a leggere nient'altro che i nostri aridi compendi, gli studenti finiscono per odiare cordialmente la filosofia. Ma, se noi invece mettiamo nelle loro mani dei trattati originali di filosofi scelti con sani criteri di opportunità, tosto ci avvediamo che il contatto col pensiero genuino dei grandi pensatori rivela loro un mondo ignoto e fa sentire le bellezze della speculazione filosofica». D'altra parte, si ricordava che «il maestro non deve essere un arido ripetitore di formule, come purtroppo molte volte accade, ma deve far vivere dinanzi allo studente il filosofo che egli vuol conoscere»⁹².

Alcuni anni dopo, esaminando il manuale di Francesco Cosentini, intitolato *Elementi di filosofia per le scuole secondarie*, l'autrice del breve testo, Leonida Bianchi, esordì ricordando la volontà del periodico di mantenere viva l'attenzione sull'insegnamento della filosofia nei licei⁹³. Il testo di Cosentini fu tuttavia molto criticato perché riproponeva le «vecchie e rancide teorie positivistiche, per fortuna nostra da tempo in putrefazione»⁹⁴.

Nel 1916, la rivista ospitò un ulteriore intervento di Antonio Lantrua, allora docente di Filosofia nel Liceo di Acireale, ed assiduo collaboratore del periodico neoscolastico⁹⁵. Lo studioso offrì una serie di consigli educativi, suggerendo, tra le altre cose, di abituare i giovani «all'esattezza dell'osservazione, alla precisione logica del ragionamento, alla giusta posizione dei problemi» anziché tentare di persuaderli ad una particolare visione filosofica. Avanzò poi alcune proposte sui contenuti propri del percorso liceale e poi raccomandò di «avvicinare» gli studenti alla «mente di un grande pensatore» indicando alcuni classici del pensiero filosofico. Nello specifico, Lantrua suggerì il *Discorso sul Metodo* di Cartesio e le *Osservazioni sulla morale cattolica* di Manzoni.

L'anno dopo, fu lo stesso Agostino Gemelli ad intervenire sulla questione dell'insegnamento della filosofia, quando, recensendo il saggio *L'introduction de la scholastique dans l'enseignement secondaire. Une expérience et quelques réflexions* (1918), caldeggiò l'introduzione nei Licei dell'insegnamento della

⁹² *Tra riviste e libri*, «RFNS», n. 1, 1913, p. 105.

⁹³ «Abbiamo intenzione di invitare presto i lettori della Rivista di Filosofia Neoscolastica a fare con noi un piccolo viaggio nei licei classici e moderni d'Italia, per osservare come viene insegnata la filosofia. Questa volta ci accontenteremo di rivolgere uno sguardo ad un volume del prof. dott. Francesco Cosentini, edito dal Paravia nella Biblioteca di filosofia e di pedagogia» L. Bianchi, *La filosofia nei nostri licei: a proposito di un testo di filosofia*, «RFNS», n. 5, 1916, pp. 519-521.

⁹⁴ Poi conclude: «Giova sperare, per l'onore della cultura italiana, che questo spettacolo triste abbia presto a scomparire. Ed allora i volumi alla Cosentini non li distruggeremo; anzi li conserveremo preziosi, non solo come segni d'un passato poco glorioso, ma anche come libri esilaranti da prendersi in mano nei momenti di melanconia! Invece di giornali umoristici, mediteremo le idée «luminose» dei nostri vecchi e buoni positivisti» *ibid.*, p. 521.

⁹⁵ A. Lantrua, *L'insegnamento della filosofia nei licei*, «RFNS», n. 3, 1917, pp. 268-274.

filosofia tomista e neoscolastica⁹⁶. Sulla stessa proposta la rivista tornò poco tempo dopo, commentando un articolo del periodico francese «La Croix»⁹⁷. Nel 1920 si occupò dell'insegnamento della filosofia nei seminari⁹⁸ e nel 1922 segnalò un importante numero de «La nuova scuola» dedicato ai nuovi programmi di filosofia per i licei⁹⁹.

L'interesse per l'insegnamento della filosofia si espresse infine nella valutazione di vari manuali per le scuole secondarie. Nel fascicolo d'esordio fu esaminato il testo di Désiré Mercier *Corso di Filosofia ad uso dei Licei*, tradotto in Italia dalla Libreria Editrice Fiorentina¹⁰⁰. Lo stesso anno Agostino Gemelli approfondì i contenuti del primo manuale nato nell'alveo della scuola neoscolastica: il *Breve Corso di storia della Filosofia* di Giacinto Tredici, assiduo collaboratore della rivista, destinato a guidare la diocesi di Brescia tra il 1934 e il 1964. Il manuale godette di un notevole successo arrivando a contare in Italia ben dodici ristampe (l'ultima nel 1940), una traduzione in Spagna¹⁰¹, e quattro edizioni in Argentina (1943, 1946, 1950, 1958)¹⁰². Oltre al libro di Tredici, di cui furono seguite le varie pubblicazioni¹⁰³, il periodico recensì anche numerosi altri manuali per le scuole¹⁰⁴, a conferma di un interesse non solo teorico, ma anche scolastico.

La rivista intervenne invece raramente sulle numerose questioni che agitavano il dibattito politico scolastico. Si tratta di un campo lasciato perlopiù al battagliero «Vita e Pensiero», bimestrale nato in seno al gruppo gemelliano nel 1914. I

⁹⁶ A. Gemelli, E. Peillaube, *L'introduction de la scholastique dans l'enseignement secondaire. Une expérience et quelques réflexions*, «RFNS», n. 3, 1918, pp. 310-311.

⁹⁷ *Notiziario*, «RFNS», nn. 5-6, 1918, pp. 533.

⁹⁸ *Notiziario*, «RFNS», n. 6, 1920, pp. 465-470.

⁹⁹ *Notiziario*, «RFNS», n. 1, 1923, p. 93.

¹⁰⁰ G. Tredici, *Corso di Filosofia ad uso dei Licei di D. Mercier, D. Nys, J. Forget*, «RFNS», n. 1, 1909, pp. 165-166.

¹⁰¹ Id., *Breve curso de historia de la filosofía*, Barcelona, Luis Gili, 1944.

¹⁰² Id., *Historia de la filosofía; traducción y notas del Dr. Juan C. Zuretti*, Buenos Aires, Difusión, 1943.

¹⁰³ A. Gemelli, G. Tredici, *Breve corso di Storia della Filosofia*, «RFNS», n. 4, 1909, p. 656; G. Nogara, G. Tredici, *Breve corso di storia della filosofia. Seconda edizione riveduta e notevolmente ampliata*, «RFNS», n. 1, 1911, pp. 135-136; A. Gemelli, G. Tredici, *Breve Corso di Storia della Filosofia. Terza edizione riveduta e notevolmente aumentata*, «RFNS», n. 2, 1919, p. 205.

¹⁰⁴ Id., G. Faraoni, *La religione di Gesù Cristo. Corso per studenti, revisione*, «RFNS», n. 1, 1909, pp. 168-169; G. Cevolani, G. Celi, *Nuovi elementi di filosofia ad uso specialmente dei licei, Volume secondo*, «RFNS», n. 2, 1909, pp. 329-330; Id., G. Celi, *Nuovi elementi di filosofia ad uso specialmente dei licei, Volume terzo: Etica*, «RFNS», n. 4, p. 646; P. Luigi Profumo, *Corso di filosofia elementare, a norma dei programmi governativi per Licei, vol. 1., Psicologia*, «RFNS», n. 1, 1910, p. 104; C. Baroni, *Problemi antichi, idee nuove. Corso elementare di filosofia, di psicologia scientifica e di etica moderna, vol. 1., Psicologia*, «RFNS», n. 1, 1910, p. 104; G.M. Petazzi, L. Profumo *Corso di filosofia elementare a norma dei programmi governativi per licei, Volume II*, «RFNS», n. 6, 1911, pp. 710-711; F. Olgiati, *Corso di Filosofia ad uso dei licei, 2ª Edizione by Mercier, Nys, Arendt, Halleux, De Wulf*, (a cura di A. Masini), «RFNS», n. 6, 1913, pp. 657-660; *Notiziario*, «RFNS», n. 3, 1915, p. 333; F. Marzorati, G. Celi, *Nuovi elementi di filosofia ad uso specialmente dei licei: I. Psicologia*, «RFNS», n. 1, 1919, pp. 94-95.

fascicoli qui considerati presentano rarissimi cenni a queste tematiche: nel 1913 fu criticata la «Rivista pedagogica» per le posizioni assunte sia sull'avocazione della scuola allo Stato¹⁰⁵, sebbene la legge Daneo Credaro fosse da tempo stata approvata, sia per la pervicace opposizione all'insegnamento religioso¹⁰⁶. Su questo tema, tornò poco dopo, valorizzando, pur con alcune precisazioni critiche sulla visione filosofica dello studioso, le posizioni espresse da Bernardino Varisco, allora filosofo molto noto, il quale in un articolo intitolato *La scuola e la religione* uscito su «La nostra scuola» nel giugno 1915¹⁰⁷, sostenne che non si potesse esiliare l'educazione religiosa dalla scuola. «Dio – scriveva – dev'essere nominato; e non per incidenza, come si farebbe del Barbarossa o dell'elettricità; ma in guisa che il ragazzo ne avverta, ne senta l'importanza suprema; la posizione centrale nel mondo e in se stesso».

Anche sulla battaglia per la libertà d'insegnamento – questione tradizionalmente assai dibattuta nella pubblicistica cattolica – si trovano pochissimi accenni. In una recensione de *Il problema universitario* (1916) di Ignazio Tambaro, si sottolineò la necessità di riconoscere tale principio anche negli studi superiori¹⁰⁸, mentre Michele Cordovani, in un più ampio saggio sulla pedagogia dantesca, parlò della libertà d'insegnamento come una grande opportunità¹⁰⁹.

Conclusione

L'analisi dei fascicoli della «Rivista di Filosofia Neo-Scolastica» nei primi quindici anni delle sue pubblicazioni rivela il forte impegno di Gemelli e del suo gruppo sul versante pedagogico, un interesse segnato dalla volontà di elaborare una riflessione educativa coerente con la filosofia neoscolastica, in grado di dimostrare la verità delle sue premesse ed incidere con riconosciuta autorevolezza nel dibattito contemporaneo. Rispetto ai contenuti maturati dalla redazione, si possono individuare alcuni motivi dominanti che iniziarono a configurarsi con una certa sistematizzazione già in quegli anni: rispetto al dibattito sullo statuto epistemologico della pedagogia la rivista sostenne il necessario fondamento

¹⁰⁵ *Tra riviste e libri*, «RFNS», n. 1, 1913, p. 97.

¹⁰⁶ *Ibid.*, p. 98.

¹⁰⁷ *Notiziario*, «RFNS», n. 4, 1915, p. 429.

¹⁰⁸ «Leggendo le constatazioni dolorose contro le Università italiane, il nostro pensiero volava per un istante, mesto e memore, a Lovanio, a quel libero Ateneo cattolico, che attende l'ora della risurrezione e che non temeva simili rimproveri; quanti inconvenienti sarebbero eliminati sul terreno della libera concorrenza, se purtroppo la libertà d'insegnamento nel nostro paese non fosse un'altra bella e graziosa utopia, grazie al giacobinismo settario, anelante solo al monopolio dei cervelli, come se si trattasse di sale e tabacchi! Eppure, malgrado il nostro pessimismo, nelle pagine del Tambaro abbiamo sentito viva più che mai la speranza di un rinnovamento» *I. Tambaro, Il problema universitario*, «RFNS», n. 2, 1917, p. 290.

¹⁰⁹ Cfr. M. Cordovani, *Concetti filosofici e pedagogia dantesca*, «RFNS», n. 2, 1920, p. 91.

filosofico della disciplina, perorò una visione antropologica rispettosa della dimensione spirituale e valorizzò, in controtendenza con la linea adottata dalla scuola gentiliana, il contributo offerto dalle scienze sperimentali per la definizione dei mezzi educativi. Colpisce, infine, il vivo interesse per la manualistica scolastica.

Home run for civil rights: exploring social justice and the Negro Leagues through children's literature

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ABSTRACT: Educators are in a distinctive position of influencing children's appreciation for diverse cultures and heritages of the world. A number of exceptional texts are utilized in American libraries and schools portraying the African American struggle for equality. Many of those texts focus on the significant societal and political heroes such as Martin Luther King, Jr. and Rosa Parks. While these titles are essential to the story of the Civil Rights experience, this article explores lesser known texts, yet they provide gateways to understanding and empathetic perspectives for men who struggled to play baseball in the equal manner to their white counterparts. Rube Foster, Cool Papa Bell and Satchel Paige are some of baseball's most interesting characters; sadly, very few children know about them. This article examines the stories of men with a special page in history: the Negro Leagues, 1920-1960.

EET/TEE KEYWORDS: Children's literature; Civil rights; School; Negro Leagues; XXth Century.

Introduction

Numerous high-quality informational texts and biographies for youth explore the Civil Rights Movement in United States history from historical, political and societal viewpoints. As educators, scholars and librarians provide instruction related to the Civil Rights Movement, it is certainly desirable to incorporate texts introducing Ruby Bridges, Rosa Parks, the Freedom Riders, Martin Luther King, Jr. and other prominent champions of social justice during this bleak time. However, segregation permeated lifestyles other than education, transportation or ministry. Many African Americans experienced this painful page in history by being excluded from professional sports teams. The authors posit that children can internalize the concepts of social responsibility and fairness while studying texts written on the intriguing topic of the Negro League baseball.

There was a time in United States history when men of color were not allowed to play major league baseball because of the discriminatory segregation laws and beliefs of the era. They joined the «Negro Leagues». Let us then define the term, which is not utilized as a racial affront. Black baseball, or the Negro Leagues, are the actual historical terms used to define those teams which contracted baseball players of color from 1920 to the late-1940s as highlighted in *Black Diamond: The story of the Negro Baseball Leagues* by Patricia McKissack¹. Men included on these teams are now being honored and recognized in major works of non-fiction children's literature. Such texts are heralding the accomplishments and fortitude of these outstanding athletes.

Why Use Texts about the Negro Leagues?

Meaningful titles showcasing the stars of the Negro Leagues deliver meaning and relevance to the social studies curricula. Because these texts contain interesting stories and accounts steeped in history, they prove to be effective in defining and explaining Jim Crow laws, segregation and Civil Rights. Negro Leagues texts underscore the everyday injustice of segregation laws in a manner which is easily comprehensible to learners.

Another rationale for integrating Negro Leagues' selections into the classroom includes the texts' ability to support the African American experience, allowing the reader to self-identify. «Seeing self in literature is of great consequence: not seeing self in literature is also of great consequence. Not seeing self, or representations of one's culture, in literature can activate feelings

¹ P. McKissack, F. McKissack, *Black Diamond: The story of the Negro Baseball Leagues*, New York, Paw Prints, 2009.

of marginalization and cause students to question their place within society»². To activate affirmative self-images and cultivate social equity in society, we must form these healthy emotional patterns in educational settings. Research has proved all learners connect to characters within the text, looking for self within the story structure. As Boyd (1997) relates, stories are a significant springboard for self-discovery. When students encounter images and stories of characters similar to themselves they experience a sense of belonging and are able to connect to what they read³.

Hansen-Krening and Mizokawa⁴ contend that all youngsters deserve to see themselves reflected in literature in a responsive and accurate representation. Also, reading about men who have overcome obstacles, accomplishing grand feats despite seemingly insurmountable circumstances, instills hope in children from impoverished situations. African American children experience a sense of pride and validation when reading about athletes breaking down color barriers.

Moreover, Negro League titles may offer a fresh and appealing connection to characters, and thereby increased reading and achievement. Kelly, Clausen-Grace⁵ found that extremely engaged readers showed higher levels of reading accomplishment than students who were less engaged. Louise Rosenblatt (1968) theorized that children bring their own experiences, feelings and emotions to the reading process; reading is an exchange between the reader and the text. In this aesthetic reading, children draw on their past experiences, their association with words, character traits, and events in a story. Most children have played some type of sports, either organized in physical education or casually with other neighborhood children; therefore, it seems reasonable that readers would connect with these characters and their desire to be accepted onto sports teams.

Additionally, children's materials highlighting these athletes possess substantial merit for teaching positive character traits such as respect, fairness and social justice. However, the utilization and reading of these texts not only outlines this disquieting period of United States history but also serves as evocative character education material, revealing lessons in perseverance, courage, and equitable treatment of others, on a personal as well as a systemic level. These storylines produce a social and cultural channel, a counteractive influence to prejudice and racism, and a perspective in which the reader gains

² S.M. Landt, *Multicultural literature: A Kaleidoscope of Opportunity*, «Journal of Adolescent & Adult Literacy», vol. 46, 2006, pp. 690-769.

³ F. Levin, *Encouraging ethical respect through multicultural literature*, «The Reading Teacher», vol. 61, n. 1, 2007, pp. 101-104.

⁴ N. Hansen-Krening, D. Mizokawa, Z. Wu, *Literature, a driving force in ethnic identity and social responsibility development*, in F. Salilil, R. Hoosain (edd.), *Multicultural education. Issues, policies, and practices*, Greenwich, CT Information Age Publishing, 2001, pp. 211-223.

⁵ M.J. Kelley, N. Clausen-Grace, *Facilitating engagement by differentiating independent reading*, «The Reading Teacher», vol. 63, n. 4, 2009, pp. 313-318.

respect for the experiences and heritage of others. Through the ingestion of these texts, children see models of social responsibility and counter-perspectives. Children learn to exercise the skills of embracing multiple perspectives and transcending racial attitudes⁶. Educators are in a distinctive position of molding students' worldview, developing their appreciation of the contrasts and similarities among the countless cultures of the world. By including an abundance of literature depicting diverse perspectives, educators and librarians build bridges to awareness and understanding. When children encounter worthy literature featuring characters different from themselves they begin to perceive the commonalities shared by all people such as: relationships with friends and family; the need for acceptance and appreciation; as well as the universality of human experience (fears, doubts, joy). Reading the biographies of these men helps students to recognize connections to personal experiences as well. Moreover, because these texts contain exciting sports stories, facts and statistics, they have vast appeal for reluctant male readers. Boys continue to lag behind in reading for pleasure⁷. What better way to entice male readers than the beloved game of baseball-American's favorite pastime?

A Brief History of the Negro Leagues

Abner Doubleday is commonly recognized with creating the game of baseball in 1839 in Cooperstown, New York. The popularity of this enjoyable sport was color-blind and became a national favorite in the mid-to-late 1800s. African American men played on military teams, college teams and church teams. Several men were picked up by professional teams, but the Jim Crow laws would later exile them. In 1890, the International League implemented a ban on African-American players, which was not repealed until 1946. Solidifying the sanction was the 1896 Plessy vs. Ferguson case, in which the United States Supreme Court upheld Louisiana's law requiring «separate but equal» public facilities for African-Americans, a decision which established a code of racial segregation throughout the South and much of the nation.

Accordingly, in 1920, a systematized league organization for men of color was formed under the leadership of Andrew "Rube" Foster – a previous player, manager, and owner for the Chicago American Giants. The Negro Leagues were born. Out of this time period emerged numerous incredibly talented athletes,

⁶ Hansen-Krening, Mizokawa, Wu, *Literature, a driving force in ethnic identity and social responsibility development*, cit.

⁷ M. McClure, *Junior high boys lag in reading skill*, «Edmonton Journal Retrieved», vol. 1, 2014 from <<http://search.proquest.com.iris.etsu.edu:2048/docview/1609247614?accountid=10771>> (last access: 7.01.2016).

many of whom remained unrecognized due to their race. The Negro Leagues sustained an extraordinary level of athletic skill and became economically viable in many African American communities. As in the white major leagues, the Negro Leagues played their own World Series. Over the years, eleven inter-league Black World Series were held.

During World War II men of color fought alongside their white counterparts. It became evident to then Baseball Commissioner, Happy Chandler, that men who placed themselves in harm's way for America possessed the just right to put down their gun and pick up a bat to play alongside contemporaries of any race. In 1946, Jackie Robinson joined the Brooklyn Dodgers and became the first black player in major league baseball of the modern era. Black baseball fans trailed their favorite players to the Major Leagues and gradually the Negro League teams scattered. The League finally disbanded in 1960. During the era of the Negro Leagues, stellar players showed immense courage in the face of discrimination and prejudice. Negro League texts pay long overdue homage to forgotten sports heroes of color. The accomplishments of many of the men of the Negro League were admirable and dazzling, even by today's baseball standards. For decades, these successes were uncelebrated or even unknown. Children experience, by reading the texts summarized below, the pain of men who were denied an equitable opportunity to play baseball. In contrast, readers also vicariously relive the joys of the men who overcame obstacles and achieved personal goals via participation in then available sports opportunities. Readers revel in the victories of these athletes-on and off the field. Children gain new heroes, men that model perseverance and strength.

Negro League Texts as Character Education

*Satchel Paige: Striking Out Jim Crow*⁸ by James Sturm and Rich Tommaso is a graphic novel about Satchel Paige, the first African American to pitch in a major League World Series, and the first Negro Leaguer to be inducted into the Baseball Hall of Fame. This text takes a unique approach to biography: the story is told from the perspective of another baseball player in the Negro Leagues, a fictional Emmet Wilson, who crosses paths with Satchel Paige at different times in his life. Because the tale is told from the point of view of another player, this text is ideal for literary discussions as to how an author develops and compares the points of view of different characters. This book also serves as a fictional illustration of how social disparity can deflate one's self-esteem and identity. In the text, Emmet Wilson decides to share his own

⁸ L. Sturm, R. Tommaso, *Satchel Paige: striking out Jim Crow*, New York, Jump at the Sun/Hyperion Books for Children, 2007.

baseball days with his son but the significant message is how Satchel Paige shone as a symbol of pride and hope for the future. This graphic version of Satchel Paige's life and career earned the distinction of being recognized on the VOYA (Voice of Youth Advocate) Nonfiction Honor List as well as the Junior Library Guild. *Satchel Paige*⁹ by Lisa Cline-Ransome, and James Ransome as well as *Satch and Me*¹⁰, by Dan Gutman, are additional titles which pay tribute to Satchel Paige, known for his fast and accurate pitching.

Likewise, other players' successes are highlighted and celebrated in texts for youth. Middle-grade and high-school leveled texts also expose the effect of Jim Crow laws on the baseball circuit. *Black Diamond: the Story of the Negro Baseball Leagues*¹¹ by acclaimed author, Patricia McKissack, and *The Story of Black Baseball*¹², by Jacob Margolies, both disclose the consequences of discriminatory regulation. Kadir Nelson's *We are the Ship: The Story of Negro League Baseball*¹³, winner of the 2009 Coretta School King Award as well as the 2009 Sibert Award chronicles the tale of the Negro Leagues from its inception to its decline as Jackie Robinson became the first African American man to play in major league baseball. The story is enchantingly spun but the striking feature of this text is stunning paintings, posed by Nelson himself. Not only do Negro League texts provide multicultural windows into history and mirrors to the psyche, they also feature riveting stories which teach important virtues. Because of the widespread infusion of character education programs in schools, as well as the growing concern over school violence, there has been a surge in literary texts containing favorable character traits and positive behaviors. When children delve into Negro League texts, they discover a treasure trove of meaningful life lessons and positive character qualities. Men of color were forced to endure second rate lodging and travel in the Negro Leagues. Living conditions were often deplorable; bullying and harassment were commonplace. Their stories of survival despite the odds personify the traits of perseverance and courage.

For example, many adult Americans are unaware of the racial taunts that Jackie Robinson suffered. *Teammates*¹⁴ by Peter Golenbrock, illustrates not only the racial prejudice directed against Robinson, but also supplies a model for standing up for what is fair and just. Set in 1947, this picture book relates how Jackie Robinson became the first African American ever to play on a major league baseball team. Robinson faced immense jeering and taunting from his

⁹ L. Cline-Ransome, J. Ransome, *Satchel Paige*, New York, N.Y Simon & Schuster Books for Young Readers, 2000.

¹⁰ D. Gutman, *Satch and me*, New York, Harper Collins, 2006.

¹¹ McKissack, McKissack, *Black Diamond: The story of the Negro Baseball Leagues*, cit.

¹² J. Margolies, *The story of black baseball*, New York, Franklin Watts, 1994.

¹³ K. Nelson, *We are the ship: The story of Negro League baseball*, New York, Jump at the Sun/Hyperion Books for Children, 2008.

¹⁴ P. Golenbock, P. Bacon, *Teammates*, San Diego, Harcourt Brace Jovanovich, 1990.

own teammates. Then, one day in Cincinnati, his teammate Pee Wee Reese, exasperated with the harsh treatment that Robinson was enduring at the hands of his teammates, took a stand and made a gesture that acknowledged Robinson as his teammate--and someone to be treated with respect. Children who read this text walk away with the knowledge that human beings must speak up for what is honorable and moral. *Teammates* elicits discussions, prompting questions associated with the traits of loyalty, tolerance, acceptance and courage.

*The Bat Boy and His Violin*¹⁵ tells the story of Reginald, the son of one of the worst-performing baseball teams in the Negro Leagues. Reginald is enchanted with playing his violin but his father needs a bat boy. Reginald honors his father by acting as a bat boy but brings along his violin, and in his extra time, fills the dugout with his lovely music to inspire the players in an exciting comeback as they compete with the top team in the league. Although this book is just as much about a boy who is finding himself and learning to compromise as opposed to the theme of black baseball, nonetheless, it offers a glimpse into the lives of the Negro League. The analogy of Reginald finding himself can be compared to the macro issue of black baseball finding itself or the African American race finding an equal place in American society. Because Reginald cleverly finds a way to practice his violin as well as honor and help his father, *The Bat Boy and His Violin* teaches resourcefulness and parental respect.

*Who was Jackie Robinson?*¹⁶ by Gail Herman relates the story the first African American to play in the Major Leagues, as a true pioneer and hero to African Americans and to whites as well. As stated previously, Robinson suffered a great deal of abuse from his white counterparts in terms of racial slurs and derogatory teasing. This book reinforces the overarching concept for young children, so important in today's world in which bullying is rampant, that they must be confident in their own abilities and their own skin. Children may learn from this correlating discussion that they must value their own talents and opinions of themselves, not allowing other people to form their identities. As youngsters grow into adulthood, other individuals may belittle them with their words and actions but those words do not constitute their self-worth. Robinson serves as a role model, achieving his dream without letting others thwart his ambition.

¹⁵ G. Curtis, B. Lewis, *The bat boy and his violin*, New York, Simon & Schuster Books for Young Readers, 1998.

¹⁶ G. Herman, N. Harrison, *Who was Jackie Robinson?*, New York, Grosset & Dunlap, 2010.

Cultivating Diverse Perspectives with Reader Response

Of course, many of the picture books are delightfully enjoyed as read-alouds during story time with guided questions. However, the authors also suggest the use of a RAFT in conjunction with Negro League texts. A RAFT is a particularly appealing reader response activity for children to improve writing skills as well as to develop empathic points of view of multiple literary characters. A RAFT is an acronym for Role-Audience-Format-Topic. RAFTs can be created on laminated cards for many of the books cited herein. Children choose a particular role or character in the story and write to the audience in the corresponding format about a prescribed topic. The following is an example of a RAFT that might be used in association with *Teammates*. RAFTs also allow for differentiation of instruction because learners choose from the menu of roles. In the RAFT below, one student might choose to write from the perspective of Jackie Robinson in the form of a diary about this experiences as the first African American major league baseball player, whereas, another student might elect to draw a cartoon about Jackie Robinson's first day playing in the Negro Leagues.

| <i>Role</i> | <i>Audience</i> | <i>Format</i> | <i>Topic</i> |
|--|-----------------------|------------------|---|
| Magazine reporter interviewing Jackie Robinson | Magazine Readers | Magazine Article | Robinson's experience in breaking the color barrier in baseball. |
| PeeWee Reese | Jackie Robinson | Conversation | Why I will stand up for you and not allow you to be bullied |
| Jackie Robinson | Himself | Diary | My experiences as the first African American major league baseball player |
| Writer | Graphic Story readers | Graphic story | History of Negro League Baseball |
| Song writer | Listeners | Rap song | Life in the Negro Leagues |
| Artist | Readers | Cartoon | Jackie Robinson's first game in major league baseball |

This RAFT is only an illustration but the possibilities are limited only by one's imagination. Children could write poems, plays, songs, diagrams or make drawings to express the varying perspectives of characters within the stories. A RAFT is an exceptionally useful tool in allowing children to step into the shoes of literary characters, broadening their perspectives and understanding. Therefore, not only do the fascinating stories of the Negro Leagues captivate readers and provide identity in literature for African Americans, they also serve as an engaging body of works tremendously abundant in reader response opportunities.

Conclusion

The authors suggest the instructional use and sharing of Negro Leagues texts as a multicultural means of connecting readers with history and the painful lessons of segregation. Texts written about Black Baseball supply a slate of new athletic champions for sports enthusiasts as well as an impetus for boys to read. As librarians and educators share these books, provide extension activities and poignant discussion, children develop empathy for the other by means of a visceral connection with the protagonists and their stories. While focusing on America's favorite pastime, readers internalize character values such as social justice, courage and fairness, acquiring a means to carry such traits outside the classroom and into the sports arena known as daily life and association. Not only do these enthralling texts provide cultural identities, they also are rich in instructional opportunities.

Fare degli atenei delle autentiche «fucine della cultura»: Giuseppe Bottai e l'Università italiana (1936-1942)

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Making the universities genuine «forges of culture»: Giuseppe Bottai and the Italian University (1936-1942)

ABSTRACT: This contribution intends to put its focus on Giuseppe Bottai's figure and on the particular attention that he has reserved, as Minister of National Education, to a radical renewal of the National University. Through the analysis of some significant initiatives that he has promoted, such as the collection of monographs on universities (1939) and the First National Conference on the History of Italian Universities (1940), and the attentive reading of some of the most important and authoritative interventions in the field of higher education appearing on the pages of the journal «Gli Annali delle Università d'Italia», the essay reconstructs with particular detail the courageous attempt of the fascist minister to return to the Italian universities, «among the most glorious institutions of the Homeland» and best place for training new ruling class, a leading role in the international university overview.

EET/TEE KEYWORDS: History of University; History of Education; Fascism; Bottai; Italy; XXth Century.

Nel gennaio del 1939 il Ministro Bottai, notando come le Università nel nuovo rigoglio della vita fascista partecipano in maniera sempre più efficiente al complesso della vita nazionale, pensò che sarebbe stato non solo opportuno, ma doveroso, far conoscere agli italiani e anche agli stranieri, che troppo spesso o ci ignorano o fingono di ignorarci, specie nel campo della più alta funzione culturale, la nostra poderosa ascensione anche in questo campo; e nello stesso

tempo far sapere che fu proprio l'Italia a creare la prima espressione pratica e fattiva della Istituzione universitaria, che ha la eccelsa funzione di preparare i docenti e le attività tecniche più elevate della vita della nazione¹.

Con queste eloquenti ed efficaci parole Albano Sorbelli, segretario dell'Istituto per la storia dell'Università di Bologna² nonché direttore della Biblioteca Comunale dell'Archiginnasio del capoluogo felsineo³, presentava nel 1940 una significativa iniziativa di carattere culturale ed editoriale promossa nei mesi precedenti dall'allora ministro dell'Educazione Nazionale, Giuseppe Bottai⁴. Il 16 gennaio 1939, infatti, l'ex titolare del ministero delle Corporazioni

¹ A. Sorbelli, *Il primo Convegno Nazionale per la Storia delle Università italiane. Bologna, 5-7 aprile 1940 – XVIII*, «L'Archiginnasio. Bollettino della Biblioteca comunale di Bologna», vol. 35, n. 1, 1940, p. 73.

² Sulle origini e la storia dell'Istituto per la storia dell'Università di Bologna si vedano Id., *L'opera dell'Istituto per la storia dell'Università di Bologna*, «Studi e memorie per la storia dell'Università di Bologna», vol. 15, 1942, pp. 177-204 e G. Tabarroni, *Origini e attività dell'ISTUB, Istituto per la storia dell'Università di Bologna*, «Strenna storica bolognese», vol. 37, 1987, pp. 383-406. Sui più antichi e più importanti centri di ricerca sulla storia delle università italiane si vedano in particolare il sempre valido contributo di G.P. Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, in L. Sitran Rea (ed.), *La storia delle università italiane. Archivi, fonti, indirizzi di ricerca. Atti del convegno. Padova, 27-29 ottobre 1994*, Trieste, Edizioni Lint, 1996, pp. 273-292 ed il più recente L. Pomante, *Las investigaciones sobre la historia de las universidades en Italia. Un balance historiográfico del siglo pasado*, «CIAN-Revista de Historia de las Universidades», vol. 20, n. 1, 2017, pp. 163-192 (in particolare 163-165).

³ Sulla figura di Albano Sorbelli, storico, bibliografo e bibliotecario italiano, direttore della Biblioteca Comunale dell'Archiginnasio di Bologna dal 1904 al 1943, si vedano in particolare i lavori di L. De Franceschi, *Albano Sorbelli direttore dell'Archiginnasio di Bologna: il suo esordio, le sue relazioni*, Ferrara, Università degli studi di Ferrara, 1992 e *Biblioteche e cultura popolare a Bologna nella prima metà del Novecento: l'attività di Albano Sorbelli*, Milano, Fondazione Arnoldo e Alberto Mondadori, 1994.

⁴ Per un approfondimento della biografia e del contributo ideologico, politico e culturale fornito da Giuseppe Bottai si rinvia innanzitutto ai documenti dell'*Archivio personale Giuseppe Bottai* conservati presso la Fondazione Arnoldo e Alberto Mondadori (Milano); nonché al *Fascicolo Giuseppe Bottai* presente in ACS, Archivi fascisti, Segreteria particolare del Duce (1922-1943); ACS, Archivi fascisti, Direttorio Nazionale, Segreteria politica; ACS, Ministero dell'Educazione Nazionale (1929-1944), Gabinetto (1839-1943); ACS, Ministero delle Corporazioni (1926-1943), Gabinetto (1926-1959). Si vedano inoltre: G. Bottai, *Vent'anni e un giorno: 24 luglio 1943*, Milano, Garzanti, 1949; R. De Felice, *Storia degli ebrei sotto il fascismo*, Torino, Einaudi, 1961, pp. 531-598; A. Aquarone, *L'organizzazione dello Stato totalitario*, Torino, Einaudi, 1965, pp. 137-212; S. Cassese, *Un programmatore degli anni Trenta: Giuseppe Bottai*, «Politica del diritto», vol. I, n. 3, 1970, n. 3, pp. 404-447; Id., *Bottai, Giuseppe*, in *Dizionario biografico degli italiani*, Roma, Istituto della enciclopedia italiana, 1971, vol. XIII, pp. 389-404; G.B. Guerri, *Giuseppe Bottai, un fascista critico*, Milano, Feltrinelli editore, 1976; A.J. De Grand, *Bottai e la cultura fascista*, Bari, Laterza, 1978; G. Bottai, *Diario 1935-1944*, a cura di G.B. Guerri, Milano, Rizzoli, 1982; M. Galfré, *Giuseppe Bottai. Un intellettuale fascista*, Firenze, Giunti, 2000; P. Vassallo, *Giuseppe Bottai*, Chieti, Solfanelli, 2014; M.G. Bottai, *Giuseppe Bottai, mio padre: una biografia privata e politica*, Milano, Mursia, 2015. Per quanto concerne l'operato di Giuseppe Bottai in qualità di ministro dell'Educazione Nazionale si rinvia a: Ministero dell'Educazione Nazionale, *Dalla Riforma Gentile alla Carta della Scuola*, Firenze, Vallecchi, 1942; P. Nello, *Mussolini e Bottai: due modi diversi di concepire l'educazione fascista della gioventù*, «Storia

ed estensore della ben nota *Carta della Scuola*, asceso sul finire del 1936 al dicastero della Minerva⁵, con il chiaro «intento apologetico di sottolineare e valorizzare i meriti delle istituzioni universitarie italiane»⁶, aveva inviato ai rettori degli atenei della penisola una circolare nella quale si invitavano le massime autorità accademiche a promuovere una collezione di monografie sulle università affinché «la multiforme loro attività sia largamente riconosciuta e debitamente apprezzata in Italia, e anche fuori d'Italia»⁷. Per tale motivo, «sotto la direzione e il patrocinio del Ministero», ogni ateneo avrebbe dovuto provvedere a redigere la propria «autobiografia», dando vita ad un'opera di «divulgazione non volgare», nella quale

senza noiosa pedanteria per un verso, e senza vacua rettorica per un altro, la severità delle ricerche e la esattezza dei dati siano avvivate da quel calore di sincerità e di passione, che mostri in degna luce le nostre aspirazioni, le nostre fatiche, le nostre conquiste⁸.

Tale opera, destinata sia «a dare un'integrale conoscenza delle nostre Università» sia a «suscitare nella più larga sfera possibile di persone colte di tutte le Nazioni l'interessamento alle condizioni della nostra istruzione superiore», avrebbe permesso, secondo gli auspici bottaiiani, di rinverdire i fasti della gloriosa tradizione degli atenei più antichi e «di grande nobiltà culturale» e lo «splendore corrente» delle sedi più recenti, riuscendo altresì a colmare le palesi lacune di una letteratura esistente spesso antiquata, nota troppo spesso soltanto ad una «ristretta cerchia di eruditi» e espressione di «visioni frammentarie» o collegata ad argomenti tanto particolari «in guisa da non richiamare che l'attenzione di studiosi specializzati in questa o in quella branca».

Affinché la collezione di monografie da approntare potesse presentarsi, «anche nelle condizioni esteriori, con caratteri di equilibrio, di armonia e di

Contemporanea», vol. VIII, n. 2, 1977, pp. 335-366; R. Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, Firenze, La Nuova Italia, 1979; J. Charnitzky, *Fascismo e scuola. La politica scolastica del regime (1922-1943)*, Firenze, La Nuova Italia, 1994, pp. 440-483; G. Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, in I. Porciani (ed.), *L'Università tra Otto e Novecento: i modelli europei e il caso italiano*, Napoli, Jovene Editore, 1994, pp. 311-377; A. Ascenzi, R. Sani (edd.), *Il libro per la scuola nel ventennio fascista. La normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizioni, 2009, pp. 17-38.

⁵ Bottai divenne ministro dell'Educazione Nazionale il 22 novembre 1936 sostituendo Cesare Maria De Vecchi.

⁶ Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, cit., p. 277.

⁷ Archivio Centrale dello Stato (d'ora in avanti ACS), Ministero dell'Educazione Nazionale, Direzione generale dell'Istruzione superiore, Circolare n. 233 del 16 gennaio 1939, *Collezione di monografie sulle Università d'Italia*. Allegato: *Norme per la esecuzione della Collezione di monografie sulle Università d'Italia*. Il documento fu pubblicato anche su Bollettino Ufficiale del Ministero dell'Educazione Nazionale (d'ora in avanti BUMEN), vol. 66, n. 6, 7 febbraio 1939, pp. 295-301 (le citazioni sono tratte dal Bollettino).

⁸ BUMEN, *Collezione di monografie sulle Università d'Italia*, cit., p. 296.

decoro» e il prodotto finale finisse per divenire «un prezioso e indispensabile materiale a chi vorrà scrivere la storia della cultura italiana», Bottai allegava alla sua circolare una minuziosa serie di indicazioni ben precise che entravano anche nel merito del genere storiografico a cui gli estensori delle opere si sarebbero dovuti rigorosamente attenere⁹. Ciò che il ministro proponeva, come evidenziato da Gian Paolo Brizzi, era «un qualcosa di ben più impegnativo delle succinte monografie che, nel 1908, aveva promosso il ministro Luigi Rava»¹⁰, poi pubblicate in due volumi dal Ministero¹¹. Se in età giolittiana l'attenzione di Rava si era infatti rivolta soprattutto ai regolamenti interni, all'articolazione di ciascun ateneo in facoltà, al patrimonio storico-artistico posseduto e, a livello storiografico, ci si era limitati a fornire un breve e succinto cenno storico di ciascuna università, Bottai era desideroso di andare ben oltre chiedendo agli estensori delle opere un lavoro certosino che non si limitasse alla tradizionale descrizione storico istituzionale delle singole sedi o all'enfatica celebrazione del ruolo avuto dalle università magari nella rinascita del diritto romano o nella diffusione della cultura umanistica. Le nascenti «autobiografie universitarie» avrebbero invece dovuto prestare attenzione al momento delle origini e ai primi secoli di vita delle università senza tuttavia pregiudicare la conoscenza della storia più recente; inoltre, secondo un approccio metodologico molto moderno e innovativo, esse erano chiamate a descrivere e interpretare anche aspetti più complessi della storia universitaria quali il peculiare ruolo socio-culturale assunto da ciascun ateneo nei diversi momenti storici, la sua capacità di «irradiazione territoriale» e di reclutamento delle matricole, il fenomeno della mobilità di studenti e di docenti registrato tra le varie sedi e, non da ultimi, anche la ricostruzione della storia delle singole discipline e la presenza in talune sedi di grandi maestri e di valide scuole di pensiero che tanto prestigio culturale assicuravano a livello internazionale all'Italia fascista.

Per la parte antica (non meno che per la moderna...) la esposizione – si legge nelle *Norme per la esecuzione della Collezione di monografie sulle Università d'Italia* – non dovrà limitarsi alle vicende politiche e all'ordinamento giuridico della Università; ma altresì si studierà di dare, per quanto sintetica, una efficace rappresentazione dell'interno funzionamento di essa e della sua attività didattica-scientifica, della quale bisognerà mettere nella debita luce la efficacia sul progresso della cultura in Italia non solo, ma in Europa. [...]. Con proporzionata ampiezza occorre rappresentare di ciascuna [sede] le condizioni esterne e

⁹ L'allegato alla circolare, *Norme per la esecuzione della Collezione di monografie sulle Università d'Italia*, era costituito da undici punti in cui erano contenute le istruzioni dettagliate da seguire nella stesura delle monografie.

¹⁰ Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, cit., p. 277.

¹¹ Ministero della Pubblica Istruzione, *Monografie delle università e degli istituti superiori*, 2 voll., Roma, Tipografia operaia romana cooperativa, 1911-1913.

la organizzazione interna; lo sviluppo assunto nel suo complesso e nelle singole Facoltà; quanto si è fatto e si va facendo nella edilizia, nell'impianto dei gabinetti, di laboratori e di altri apprestamenti scientifici, nella creazione di seminari, di biblioteche, di scuole, nella fondazione di cliniche¹².

Di fatto, in queste monografie, il cui valore intrinseco e l'efficacia divulgativa sarebbero stati ulteriormente accresciuti dall'inserimento al loro interno di un numero considerevole di illustrazioni di riconosciuto «interesse storico, artistico, scientifico e perfino panoramico» riferentisi ad eventi di particolare importanza per la storia dei singoli atenei, ogni università era chiamata a dare

una obiettiva e fedele rappresentazione della sua integrale esistenza nell'attuale momento storico, non senza accennare pure verso quali mete proprie essa tenda, per modo che, sebbene tutte armonicamente concorrano alla progressiva elevazione della cultura nazionale e imperiale, nondimeno ciascuna aspira ad affermare una sua caratteristica individualità.

Alla luce dell'ampiezza e della complessità dell'ambiziosa iniziativa bottaiana, per realizzare siffatte pubblicazioni, ogni ateneo, o istituto superiore assimilato, era invitato a costituire un ristretto comitato di studiosi, incaricato di raccogliere e organizzare la letteratura esistente e le testimonianze utili alla stesura di una storia del proprio ateneo. Tali comitati, i cui componenti sarebbero stati individuati «con prudente e illuminato criterio del Rettore» tra coloro che per «preparazione, attitudine e occupazione si giudichino» i più idonei «ad assolvere degnamente questo compito», in controtendenza con la tradizione fino ad allora imperante, sarebbero stati formati non dai soli docenti di Storia medievale o moderna o di Storia del diritto, bensì da rappresentanti di tutte le facoltà esistenti in ogni singola sede senza tralasciare in alcun modo quelle scientifiche, in modo che le monografie, seppur redatte da un solo studioso per ateneo al fine di evitare il classico «centone di pezzi più o meno abilmente cuciti tra loro», avrebbero rappresentato concretamente il frutto di un lavoro interdisciplinare¹³.

Il prodotto finale, alla cui realizzazione avrebbero potuto collaborare, seppur in un ruolo subordinato, anche funzionari degli uffici amministrativi o studenti incaricati di compiere particolari ricerche magari sugli «svariati aspetti della vita universitaria nel passato e nel presente», sarebbe stato, per ogni ateneo, «un volume unico di medie dimensioni, di facile maneggio e tale che attragga anche per la sua veste tipografica, ispirata a sobria e conveniente eleganza».

¹² BUMEN, *Collezione di monografie sulle Università d'Italia*, cit., p. 298.

¹³ Il ministero, tuttavia, si riservava, a pubblicazione avvenuta, di erogare a favore del solo autore che avrebbe redatto la monografia una somma in denaro che doveva essere intesa non quale «compenso per una pubblicazione eseguita a fini editoriali, bensì un premio, che, quantunque in danaro, deve avere soprattutto un significato morale». L'opera degli altri componenti del Comitato e di persone estranee, che avevano contribuito alla monografia, sarebbe stata assolutamente gratuita (si veda BUMEN, *Collezione di monografie sulle Università d'Italia*, cit., p. 300).

Tali pubblicazioni, inoltre, il cui materiale doveva essere consegnato entro la fine di dicembre 1939 in modo da garantire «speditamente» la stampa dei volumi già nell'anno successivo, sarebbero state poi oggetto di traduzione in più lingue straniere a cura e a carico del ministero

Il progetto elaborato da Bottai avrebbe di fatto cercato di perseguire un duplice obiettivo. Da un lato, a partire da questa iniziativa editoriale, le università italiane erano chiamate a dar vita, sulla scorta dell'esempio dell'Istituto per la storia dell'Università di Bologna, che Bottai considerava un modello da esportare in tutti gli atenei, ad un apposito istituto o altro ente consimile, che attendesse in maniera specifica e permanente alla storia del proprio ateneo e a tutti quegli studi, anche futuri, in materia d'istruzione superiore; dall'altro, grazie al considerevole numero di monografie previste, sarebbe stata creata una vera e propria biblioteca di storia universitaria da utilizzare a livello propagandistico sia in Italia che all'estero al fine di veicolare l'immagine, soprattutto fuori dai confini nazionali, di un Paese che era stato culla della cultura nei secoli addietro e che si candidava ad esserlo nuovamente grazie alle opere e ai progetti del regime fascista¹⁴.

Del resto che il ministro Bottai coltivasse da tempo l'idea di investire le università di un ruolo cardine in quel rinnovamento politico e sociale che egli auspicava per il Paese non era affatto un mistero. Già da sottosegretario di Stato al ministero delle Corporazioni, nella seconda metà degli anni Venti¹⁵, egli aveva più volte espresso la propria convinzione di considerare gli atenei italiani veri e propri centri «di formazione, di propulsione e di irradiazione» della cultura, presso i quali si sarebbero formate le nuove classi dirigenti, quella élite che di fatto avrebbe guidato la società e garantito al fascismo una duratura esistenza¹⁶. Quella perseguita da Bottai, tuttavia, non va intesa quale semplice volontà di «fascistizzazione» del sistema universitario italiano, quanto piuttosto come l'aspirazione a ridefinire in forme nuove il ruolo stesso degli

¹⁴ Appare opportuno sottolineare che, soprattutto con riferimento a questa seconda finalità, il progetto di Bottai era perfettamente in linea con la propaganda che in quel medesimo periodo i Gruppi Universitari Fascisti (GUF) avevano avviato al fine di porre le basi per legami solidi ed affidabili con i giovani intellettuali europei e non, pubblicando innanzitutto un corposo volume, tradotto in lingua inglese, sulla storia delle università italiane (*The University of Italy*, s.l., s.e., 1934), proponendo quindi la traduzione di riviste rivolte ai giovani universitari del mondo occidentale e mettendo così in atto uno «sforzo particolare presso alcune minoranze più ricettive di giovani emigrati ai fini di una penetrazione culturale e spirituale dell'ideologia nei paesi ospitanti» (si veda in proposito E. Gentile, *La politica estera del partito fascista. Ideologia e organizzazione dei Fasci italiani all'estero (1920-1930)*, «Storia contemporanea», vol. 26, n. 6, 1995, pp. 897-956).

¹⁵ Dal 6 novembre 1926 al 12 settembre 1929 Giuseppe Bottai fu sottosegretario di Stato al ministero delle Corporazioni, dicastero istituito con R.D. del 2 luglio 1926 e che Mussolini assunse in prima persona. Bottai fu poi titolare dello stesso dicastero fino al 20 luglio 1932, data in cui il Duce decise di riassumere direttamente la responsabilità della politica corporativa.

¹⁶ Sul tema si veda L. Pomante, *Fascismo, cultura e università in un importante discorso di Giuseppe Bottai (1928)*, «History of Education & Children's Literature», vol. 8, n. 1, 2013, pp. 713-726.

atenei della penisola come luoghi di elaborazione della cultura e della scienza nonché sedi privilegiate per la formazione della futura classe dirigente fascista. Secondo Bottai, infatti, preoccupazione primaria di ogni regime doveva essere quella di rinnovarsi continuamente e coraggiosamente di fronte al progredire incessante del processo storico e alle sempre mutevoli esigenze della realtà. Come sottolineato da Paolo Nello, infatti, il fascismo era riuscito a trionfare sul liberalismo proprio perché al cospetto di «una dottrina e di un'organizzazione statale ormai 'sclerotizzate' era stato in grado di presentarsi come il movimento politico espressione delle profonde esigenze di rinnovamento proprie dei tempi»¹⁷. Ora, lo stesso fascismo doveva tassativamente evitare il medesimo errore commesso dal liberalismo trasformandosi da «forza rivoluzionaria [...] a museo di idee convenzionali». A tale naturale processo di invecchiamento ci si poteva opporre solo grazie all'apporto dei giovani, al loro entusiasmo, al loro ardimento, alla loro capacità intuitiva e innovativa¹⁸. Tali «forze nuove» andavano tuttavia preparate politicamente e tecnicamente per i posti di comando affinché le tante doti positive riconosciute ai giovani non si risolvessero in «faciloneria e pressapochismo»¹⁹. In proposito, facendosi portavoce pedissequo del pensiero di Giuseppe Bottai, Gian Paolo Callegari, in un noto articolo pubblicato nel 1930 su «Critica fascista», rivista di cui lo stesso Bottai era direttore-fondatore²⁰, dal titolo *Cariche ai giovani ovvero giovani alla carica*, scriveva:

Vi deve essere una naturale graduazione di responsabilità fino a formare nel giovane l'invocata esperienza e la carica deve essere consona all'età, alla preparazione, alla mentalità

¹⁷ Nello, *Mussolini e Bottai: due modi diversi di concepire l'educazione fascista della gioventù*, cit., p. 338.

¹⁸ Il dibattito sul ruolo che i giovani avrebbero dovuto assumere nella guida e nella crescita del Paese fu talmente acceso che lo stesso Mussolini non poté fare a meno di intervenire con una nota che apparve anonima sul «Foglio d'ordini» del Partito Nazionale Fascista n. 64 del 20 gennaio 1930. Nella nota, dal titolo *Punti fermi sui giovani*, si parlava di: «programmatica giovanilità» del regime, «preparazione totalitaria» dei giovani a cura del regime stesso, «avviamento risoluto» dei giovani al tirocinio politico e «preparazione spirituale» dei giovani al clima morale del fascismo. Per il testo integrale della nota si rimanda a E. Susmel, D. Susmel (edd.), *Opera omnia di Benito Mussolini, Appendice 1, scritti: 1907-1945*, Roma, Volpe, 1978, pp. 358-359.

¹⁹ Nello, *Mussolini e Bottai: due modi diversi di concepire l'educazione fascista della gioventù*, cit., p. 339.

²⁰ Il periodico «Critica fascista» fu fondato il 15 giugno 1923 da Giuseppe Bottai al fine approfondire ed arricchire il dibattito intellettuale all'interno del movimento fascista. L'ultimo fascicolo fu edito il 15 luglio 1943. Sui principali temi affrontati da tale rivista si vedano i sempre validi lavori di G. De Rosa, F. Malgeri (edd.), *Critica fascista: 1923-1943 con antologia di testi e saggi introduttivi*, San Giovanni Valdarno, L. Landi, 1980, e di C. Bordoni, *Fascismo e politica culturale: arte, letteratura e ideologia in «Critica fascista» con presentazione di Giuliano Manacorda*, [Bologna], Brechtiana, 1981.

dei candidati. Deve essere una scuola di comando, il più delle volte, e non un comando reale che, se usato per la prima volta impreparatamente, porta a sicure intemperanze. Perfino ai giovanissimi della leva si debbono dare incarichi [...] incarichi per esperimento. Sperimentare chi lo vuole, per trovare chi vale, formare una naturale selezione e lanciare i meritevoli²¹.

Da questa particolare attenzione per la formazione delle nuove generazioni scaturiva il notevole interesse di Giuseppe Bottai per le università italiane e per il loro concreto e effettivo “rilancio”. Esse, culla di una nuova cultura improntata agli ideali del regime, sarebbero state chiamate a contribuire in maniera determinante a selezionare e preparare una giovane classe dirigente integralmente fascista alla quale Bottai attribuiva il compito di garantire il ricambio generazionale e, di conseguenza, un auspicato rinnovamento della società italiana²².

Il ministro fascista rimarcò tale sua specifica attenzione per l'istruzione universitaria in numerosi suoi interventi ufficiali ascrivibili al biennio 1937-1938²³, quando non mancò di evidenziare come il rilassamento dell'insegnamento universitario italiano, da più parti lamentato, rappresentasse «un male, che si ripercuote, crescendo d'intensità, su tutti gli ordini della Scuola»²⁴ e che presto avrebbe potuto pesare anche sulla vita economica e politica del Paese. Proprio per scongiurare tale pericolo, la Scuola avrebbe avuto bisogno di «un nuovo slancio, di uno spirito nuovo»²⁵ e le università sarebbero state chiamate a recuperare quanto prima il loro ruolo di «fucine della cultura»²⁶ e, nel contempo, mostrarsi al passo con i tempi e con la mutata realtà sociale e lavorativa del Paese. Del resto, come opportunamente sottolineato da Giordano Bruno Guerri, il tentativo di creare uno stretto legame tra la formazione, il mondo del lavoro e il regime fascista era da sempre un punto nevralgico dell'azione

²¹ G.P. Callegari, *Cariche ai giovani ovvero giovani alla carica*, «Critica fascista», vol. 8, n. 19, 1 ottobre 1930, pp. 85-87. Le pagine di «Critica fascista» ospitarono, a partire dal 1927, non pochi interventi sul problema della formazione di una nuova classe dirigente compiutamente fascista anche in virtù del fatto che lo stesso direttore Bottai aveva più volte affermato che quello dei giovani era da considerare il problema centrale del fascismo (G. Bottai, *Funzione della gioventù*, «Critica fascista», vol. 11, n. 5, 1° marzo 1933, pp. 2-4). In proposito si vedano Nello, *Mussolini e Bottai: due modi diversi di concepire l'educazione fascista della gioventù*, cit., pp. 335-343 e Guerri, *Giuseppe Bottai, un fascista critico*, cit., pp. 133-146.

²² Il dibattito sulla «nuova classe politica fascista» fu alimentato in particolar modo dall'articolo di G. Granzotto, *La formazione di una classe dirigente*, «Critica fascista», vol. 15, n. 14, 15 maggio 1937, pp. 254-256, in cui l'autore lamentava la mancanza di una seria preparazione culturale e politica dei quadri del regime. Si veda in proposito Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, cit., pp. 345-347.

²³ Pomante, *Fascismo, cultura e università in un importante discorso di Giuseppe Bottai* (1928), cit., pp. 718-720.

²⁴ G. Bottai, *Sul bilancio dell'educazione nazionale. Discorso pronunciato alla Camera fascista nella tornata del 10 marzo 1938*, in Id., *La Carta della Scuola*, Milano, Mondadori, 1939, pp. 126-134 (le citazioni sono alle pp. 129-130).

²⁵ *Ibid.*, p. 133.

²⁶ *Ibid.*, p. 129.

politica di Bottai, il quale, sin dall'avvio della sua esperienza al ministero dell'Educazione Nazionale nel 1936, aveva manifestato la volontà di rilanciare il disegno già perseguito negli anni precedenti al dicastero delle Corporazioni, ossia di promuovere una formazione scolastica e universitaria a misura della nuova organizzazione corporativa del lavoro e della produzione²⁷.

Nel concreto la progettualità e il riformismo scolastico e formativo di Bottai trovarono soddisfazione, com'è noto, nell'emanazione della *Carta della Scuola*, la quale, approvata dal Gran Consiglio del Fascismo il 15 febbraio 1939, si configurava come un documento politico-programmatico in cui erano enucleati i principi fondamentali che avrebbero dovuto ispirare l'opera di riordinamento del sistema scolastico e universitario italiano²⁸. La *Carta*, infatti, si basava sul principio cardine secondo il quale la Scuola e la cultura avrebbero dovuto costituire gli elementi basilari per il potenziamento dello Stato fascista. Non a caso proprio nella *Relazione al Duce e ai camerati del Gran Consiglio sulla Carta della Scuola* del 19 gennaio 1939, il ministro, presentando dettagliatamente i contenuti della *Carta*, in maniera quanto mai lineare e scevra da fraintendimenti, aveva messo in rilievo la *ratio* alla base della sua opera riformatrice e soprattutto aveva delineato il nuovo modello di Scuola, e più in generale di istruzione, che egli intendeva proporre, ormai avvertito sempre più necessario alla luce di un sistema scolastico italiano quanto mai bisognoso di un immediato intervento «risanatore»:

Il presente piano di riforma – asseriva Bottai – è stato meditato, dopo aver lungamente e oculatamente studiato le deficienze attuali del nostro organismo scolastico. Queste deficienze sono di due ordini: uno riguarda l'interno deteriorarsi del sistema scolastico per cause di ordine organizzativo e didattico, l'altro la sua rispondenza sempre minore, anche se ben funzionante in sé, alle attuali condizioni e necessità della vita nazionale. Il presente piano di riforma, quindi, non rinnova soltanto delle costruzioni didattico-pedagogiche, ma parte innanzitutto da un principio politico, che impone di adeguare l'organismo della Scuola alle necessità del Paese²⁹.

²⁷ Si vedano sull'argomento Guerri, *Giuseppe Bottai, un fascista critico*, cit., pp. 133-146 e De Grand, *Bottai e la cultura fascista*, cit., pp. 255-256.

²⁸ Sulla *Carta della Scuola*, accanto al già citato Bottai, *La Carta della Scuola*, cit., contenente il testo integrale del documento e le relative relazioni di accompagnamento presentate dal ministro, oltre ad un numero considerevole di interventi di Bottai stesso in materia di educazione e istruzione, si vedano la sempre valida bibliografia riportata in T. Tomasi, *Idealismo e Fascismo nella scuola italiana*, Firenze, La Nuova Italia, 1969, pp. 165-180 ma anche le attente analisi critiche della *Carta* offerte in particolare in Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, cit., pp. 351-352 e in M. Ostenc, *La scuola italiana durante il fascismo*, Roma-Bari, Laterza, 1981. Si veda, infine, tra i lavori più recenti, M.A. D'Arcangeli, *Note su Giuseppe Bottai, «il problema di un umanesimo moderno» e la Carta della Scuola (1939)*, «Rivista di Storia dell'Educazione», vol. 3, n. 2, 2016, cd rom, pp. 207-216

²⁹ G. Bottai, *Relazione al Duce e ai camerati del Gran Consiglio sulla Carta della Scuola*, in Id., *La Carta della Scuola*, cit., p. 57.

Di qui l'opportunità, a giudizio del ministro, di sostituire alla «Scuola borghese per principio e per pratica, una Scuola popolare, che sia veramente di tutti e che risponda veramente alle necessità di tutti, cioè alle necessità dello Stato». In questo modo si offriva concretamente a tutti la possibilità effettiva di frequentare gli studi di ogni grado, ma, nel contempo, ciascuno avrebbe dovuto adempiere

al dovere di compiere il servizio scolastico nell'interesse dello Stato, cioè secondo le sue attitudini più vere, impegnando tutte le sue facoltà e la sua intera responsabilità, in modo che la Scuola sia la riserva dalla quale lo Stato trae continuamente le fresche energie di cui ha bisogno, non l'ufficio nel quale la inconsulta vanità borghese ricerca i bolli e le patenti per la sua sterile ambizione. Di qui la necessità di unificare la Scuola nei suoi primi gradi per poter selezionare, di ridare dignità agli studi per valorizzare l'impegno autentico, di differenziare gli ordini superiori di scuola per offrire uomini capaci di coprire i quadri necessari alla vita nazionale, di ridare valore ai piccoli titoli, perché possano riacquistare valore i titoli maggiori.

Ovviamente nel nuovo modello scolastico bottaiano, che prevedeva uno stretto rapporto di "dipendenza" tra Scuola e vita nazionale, l'Università era destinata a ricoprire una funzione di primo piano. Ad essa, nello specifico, era dedicata la *XIX Dichiarazione* della *Carta della Scuola*, secondo la quale:

L'Università ha per fine di promuovere in un ordine di alta responsabilità politica e morale il progresso della scienza e di fornire la cultura scientifica necessaria per l'esercizio degli uffici e delle professioni. I corsi e le scuole di perfezionamento hanno caratteri e fini prettamente scientifici; i corsi e le scuole di specializzazione hanno finalità prevalentemente pratiche in rapporto a determinati rami di attività professionali. Addestramento sportivo-militare e pratica del lavoro concorrono alla formazione spirituale dei giovani³⁰.

La *Dichiarazione*, di fatto, indicava le finalità culturali e professionali dell'Università e delle scuole di perfezionamento e di specializzazione, rimanendo nei suoi contenuti molto aderente alle tradizioni italiane, tanto da riprendere dalla legge Casati del 1859 la definizione della funzione universitaria («promuovere [...] il progresso della scienza e [...] fornire la cultura scientifica necessaria per l'esercizio degli uffici e delle professioni»). Rispetto ai precedenti legislativi di età liberale, però, la *Carta della Scuola* puntava a sottolineare con forza il carattere formativo dell'insegnamento universitario principalmente sul piano politico e morale – ricordando altresì la funzione svolta, a questo fine, anche dall'«addestramento sportivo-militare» e dalla «pratica del lavoro» poiché il regime esigeva professionisti di livello, che fossero culturalmente, fisicamente e politicamente preparati.

Bottai, tuttavia, nel suo programma di trasformazione/bonifica dell'istruzione (il termine riforma appariva al ministro troppo connesso al passato gentiliano)

³⁰ Id., *Carta della Scuola. XIX Dichiarazione*, in Id., *La Carta della Scuola*, cit., pp. 83-84.

non intendeva fermarsi ai semplici principi declaratori enunciati nella sua *Carta della Scuola*. Sua intenzione, infatti, era quella di andare oltre al fine di risvegliare intorno all'istruzione superiore italiana quel fermento e quell'interesse che da anni sembravano essersi smarriti. Così, dopo aver incoraggiato nei primi mesi del 1938 una serie di iniziative di ricerca a sostegno di studi di storia universitaria³¹ ed aver avviato nel gennaio del 1939 la già ampiamente ricordata opera di promozione e redazione di monografie storiche dei singoli atenei, pensò bene di coinvolgere maggiormente le forze intellettuali del Paese nella creazione di una cultura specifica, anche se non omogenea, che tentasse contestualmente di soddisfare le esigenze del regime e di garantire al mondo universitario il riconoscimento di quel ruolo educativo e culturale che doveva necessariamente contraddistinguere un sistema d'istruzione superiore serio e rigoroso.

È in questo preciso contesto che il 29 ottobre 1939, a cura del ministero dell'Educazione Nazionale, per i tipi della casa editrice Fratelli Palombi di Roma, vedeva la luce il primo numero della nuova rivista «Gli Annali della Università d'Italia. Rivista bimestrale dell'Istruzione Superiore», sapiente e riuscita miscela «fra uomini della burocrazia ministeriale, che conducevano il gioco, e docenti di grande fama e di sicura fede, che portavano al centro non solo le loro competenze scientifiche, ma anche le singolarità delle sedi locali»³².

Fortemente voluto da Giuseppe Bottai, il nascente periodico, le cui pubblicazioni si sarebbero protrate per circa quattro anni³³, era diretto da Giuseppe Giustini, alto funzionario del ministero dell'Educazione Nazionale (dal 1934 era Direttore generale dell'istruzione superiore) e uomo di fiducia del ministro³⁴. A supportare il lavoro del direttore c'erano un comitato consultivo, costituito prevalentemente da professori universitari di fama nazionale provenienti da vari settori disciplinari (giuristi, medici, matematici, storici, filosofi) e tra i quali spiccavano in particolare gli ex ministri Balbino Giuliano

³¹ In particolare nei primi mesi del 1938 il ministro Giuseppe Bottai incoraggiò una serie di iniziative promosse dalla Reale Accademia d'Italia che, tra le altre cose, bandì anche un concorso nazionale per uno studio a cura di un autore italiano sul tema *Storia delle Università Italiane* con annesso premio di dieci mila lire offerte dal facoltoso docente di Farmacologia Prassitele Piccinini. Si veda su ciò R. Gurrieri *Concorso nazionale per una 'Storia delle Università Italiane*, «L'Università italiana. Rivista dell'istruzione superiore», vol. 34, n. 4, aprile 1938, pp. 50-51 e Id., *Una fondazione per la storia delle università italiane*, «L'Università italiana. Rivista dell'istruzione superiore», vol. 34, n. 7, luglio 1938, pp. 101-103.

³² Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, cit., p. 353. Il testo di Giuseppe Ricuperati dedica all'analisi dei principali temi affrontati dalla nuova rivista «Gli Annali della Università d'Italia. Rivista bimestrale dell'Istruzione Superiore» le pp. 353-367.

³³ Il primo numero della rivista (vol. 1, n. 1) fu pubblicato il 29 ottobre del 1939 mentre l'ultimo numero fu edito il 1° settembre 1943 (vol. 4, n. 6).

³⁴ Giuseppe Giustini era un alto funzionario del ministero dell'Educazione Nazionale che, in quel preciso momento, ricopriva l'incarico di Direttore generale dell'istruzione superiore (in pratica era il Capo di gabinetto del ministero tenuto da Bottai) dopo essere stato a lungo responsabile di quella media. Nel 1916 era stato segretario dell'on. Paolo Boselli.

e Pietro De Francisci nonché il costituzionalista e presidente del Consiglio di Stato Santi Romano³⁵, e un comitato di redazione formato in prevalenza da personale amministrativo universitario o ministeriale³⁶.

Lo stesso direttore Giustini, nel primo numero della rivista, specificava in maniera chiara quali fossero le finalità che la nuova pubblicazione intendeva perseguire. Sorti per colmare la «lacuna generata dall'assenza» di un periodico concernente l'istruzione universitaria³⁷, sede deputata ad accogliere «le forze intellettualmente più vigorose della gioventù d'Italia [per prepararle] alle più ardue conquiste della scienza e alle più nobili missioni entro e fuori i confini della Patria, gli «Gli Annali della Università d'Italia» si prefiggevano il compito di

approfondire lo studio della nostra Università nei molteplici aspetti della sua struttura e delle sue funzioni, e cercare che di essa non solamente nel mondo dei dotti, ma anche in un'ampia sfera di persone colte, si possa avere una conoscenza adeguata. Giacché [...] una conoscenza sicura e precisa non potrà che maggiormente suscitare e diffondere intorno alla più alta istituzione della scuola nazionale un senso di cosciente estimazione e di legittimo orgoglio³⁸.

L'Università che Giustini e il suo gruppo di intellettuali intendevano studiare ed esaminare in tutte le sue sfaccettature doveva tuttavia necessariamente fuggire da quell'isolamento, da quell'immobilismo e da quell'indifferenza che avevano caratterizzato spesso il suo passato, per cercare, al contrario, di calarsi e confrontarsi con il «mondo che le si agita dintorno, tra le forze molteplici

³⁵ Il comitato consultivo della rivista era formato da tutti professori universitari, in prevalenza legati all'Università di Roma, molti dei quali anche senatori del Regno: Gaspare Ambrosini (Diritto ecclesiastico a Roma), Celestino Arena (Scienza delle finanze e diritto finanziario a Napoli), Ugo Bordoni (Fisica tecnica a Roma), Rodolfo Bottacchiari (Letteratura tedesca a Napoli), Giuseppe Cardinali (Storia romana a Roma), Dante De Blasi (Igiene ed epidemiologia a Roma), Pietro De Francisci (Storia del diritto romano a Roma), Gian Maria Fasiani (Clinica chirurgica generale e terapia chirurgica a Milano), Cesare Frugoni (Clinica medica a Roma), Francesco Giordani (Elettrotecnica a Napoli), Balbino Giuliano (Filosofia morale a Roma), Federico Millosevich (Mineralogia a Roma), Marcello Piacentini (Urbanistica a Roma), Santi Romano (Diritto costituzionale a Roma), Francesco Severi (Analisi infinitesimale a Roma), Filippo Silvestri (Entomologo a Napoli), Giancarlo Vallauri (Ingegneria elettrotecnica a Roma), Gioacchino Volpe (Storia moderna a Roma).

³⁶ Il comitato di redazione, almeno al momento della fondazione del periodico, era formato da Francesco De Filippis, Gerardo Padula, Giuseppe Sangiorgio, Giuseppe Spadaro, Nicola Spano, Enrico Vallerini.

³⁷ In realtà esistevano già in quel periodo periodici che si interessavano di istruzione universitaria. Basti pensare, solo per citare il più importante e il più longevo, alla rivista «L'Università italiana. Rivista dell'istruzione superiore», il cui primo numero fu pubblicato nel maggio 1902 mentre l'anno di sospensione delle pubblicazioni fu il 1942. Sui periodici universitari tra Otto e Novecento si veda l'interessante contributo di M. Moretti, «Noi e le nostre università». *Schede sulle riviste professorali italiane fra Otto e Novecento*, in G. Angelozzi, M.T. Guerrini, G. Olmi (edd.), *Università e formazione dei ceti dirigenti. Per Gian Paolo Brizzi, pellegrino dei saperi*, Bologna, Bononia University Press, 2015, pp. 521-538.

³⁸ G. Giustini, «Gli Annali della Università d'Italia», vol. 1, n. 1, 29 ottobre 1939, pp. 3-6.

che audacemente vengon tessendo la trama della storia», al fine di «adeguarsi e armonizzarsi con le attività e le necessità della vita sempre rinnovantesi della Nazione». A tale Università il ministro Bottai, del resto, come spiega bene Giustini nel suo editoriale di apertura, aveva attribuito una funzione precipua, che «se pur unica nella sua essenza», presentava tre distinti «elementi costitutivi»:

a. La preparazione tecnica alle professioni più elevate o più difficili, che nella convivenza sociale ogni giorno più si specificano e si sviluppano; b) indagine in tutte le branche dello scibile, la quale promossa da un interesse puramente scientifico, può, in un secondo tempo, avere applicazioni pratiche della massima importanza; c) strumento il più idoneo e poderoso a plasmare, attraverso la parte più eletta delle nuove generazioni, la coscienza nazionale, esplicando in tal modo una missione spirituale, il cui valore supera la efficacia stessa della cultura.

Agli intellettuali e, più in generale, a tutti coloro che sarebbero stati coinvolti nel progetto editoriale avviato dalla nuova rivista, docenti universitari o uomini insigni, «che stanno magnificamente ai posti di comando nei settori svariati della vita sociale»³⁹, l'incarico di compiere una scrupolosa e diligente disamina di come e se l'Università italiana fosse ancora capace di adempiere alla funzione assegnatale, «ad un tempo, una e trina», facendo brillare gli indiscussi pregi del mondo dell'istruzione superiore della penisola ma anche mettendo in rilievo quelle carenze e quelle lacune da colmare quanto prima:

E questa disamina verremo svolgendo con perfetto spirito di obiettività, nulla cercando di attenuare o di celare, e nulla cercando di magnificare col partito preso di una esaltazione ad ogni costo. In ogni modo, da un lato, sarà giusto il mettere in piena luce le numerose e incontestabili benemerienze, che la Università italiana ha saputo acquistarsi e va acquistando tutti i giorni; e dall'altro, sarà utile il rilevare se e dove e come sussistano inconvenienti, per difetto o per eccesso, cui occorra apportare adeguati rimedi.

Ovviamente che la nuova rivista potesse presentare contenutisticamente e ideologicamente innumerevoli e forti punti di contatto con i già ricordati interventi pressoché coevi di Bottai in materia universitaria e soprattutto con la *Carta della Scuola* da poco venuta alla luce appare un elemento inevitabile. Non a caso il primo articolo pubblicato sugli «Gli Annali della Università d'Italia», dopo quello di apertura del direttore, era intitolato *L'Università nella Carta della Scuola* ed era redatto addirittura dallo stesso ministro. Seppur di poche pagine e con un linguaggio quanto mai lineare ma comunque efficace, come del resto era nello stile di Bottai, l'intervento può essere considerato una sorta di manifesto programmatico della concezione bottaiana della Scuola e dell'Università in particolare.

³⁹ *Ibid.*, p. 5.

Innanzitutto il ministro respingeva le critiche e le perplessità sollevate circa la presenza all'interno della *Carta della Scuola* di una sola *Dichiarazione*, la numero XIX, dedicata all'istruzione universitaria, sottolineando come in realtà la Scuola, in ogni suo ordine e grado d'istruzione, dovesse essere intesa come unitaria e pertanto da studiare e comprendere come un blocco unico e di conseguenza da riformare integralmente e non solo parzialmente. Per questo motivo, anche all'interno delle prime *Dichiarazioni*, raggruppate sotto il titolo *Principi, fini e metodi della scuola fascista*⁴⁰, non vi erano enunciati che non fossero riconducibili a tutto il sistema scolastico italiano, istruzione superiore inclusa.

La Scuola – spiegava Bottai – è, da un grado all'altro e da un ordine all'altro, una. Chi vuole riformarla in un punto deve riformarla tutta; nel suo spirito, in ispecie, nel suo stile, nel suo costume; e non solo in questa o in quella struttura. [...] Si getti lo sguardo a caso su questa o quella dichiarazione: non v'è enunciato che non valga per tutta la Scuola; e che, anzi, salendo da un ordine all'altro, non accresca la sua importanza, fino ad acquistare proprio in quello universitario pienezza d'espressione⁴¹.

Chiarito tale aspetto Bottai sottolineava quindi la funzione politica e sociale che la Scuola era chiamata ad assolvere «nell'unità morale della Nazione, nell'unità dello Stato, in rapporto con la famiglia, la Corporazione e il Partito», ribadendo come soltanto nell'Università sarebbe stato possibile attingere a quei supremi valori della cultura e della scienza, «nei quali in fin de' conti consiste la civiltà d'un Paese, e quindi anche la sua efficienza e potenza politica»:

La XIX dichiarazione [...], con il richiamo alla 'alta responsabilità politica e morale', intende proprio riassumere nella scuola universitaria il carattere formativo di tutta la Scuola. Se questa infatti 'forma la coscienza umana e politica' delle nuove generazioni', come potrebbe l'Università rinunciare alla parte che le spetta, la più delicata e difficile, di formarla, quella coscienza, nei giovani scienziati e professionisti, che saranno, crescendo negli anni, tanta parte della Nazione e dello Stato?

In maniera assai eloquente, pertanto, il titolare della Minerva riconosceva all'Università il compito estremamente complesso ed ambizioso di formare una ristretta e competente futura classe dirigente e non semplicemente quello di educare ed istruire le nuove generazioni che sarebbe invece toccato a scuola elementare e media. Per non fallire l'obiettivo era tuttavia necessaria all'interno del mondo accademico italiano una vera e propria «rivoluzione universitaria», che, al passo con i tempi e con le evoluzioni fatte registrare dalla società circostante, sarebbe dovuta partire dal rinnovamento dei metodi

⁴⁰ Sotto la dicitura *Principi, fini e metodi della scuola fascista* erano ricomprese le prime sette *Dichiarazioni* della *Carta della Scuola* (si veda Bottai, *Carta della Scuola. Principi, fini e metodi della scuola fascista*, in Id., *La Carta della Scuola*, cit., pp. 75-78).

⁴¹ G. Bottai, «L'Università nella *Carta della Scuola*», «Gli Annali della Università d'Italia», vol. 1, n. 1, 29 ottobre 1939, pp. 7-11.

d'insegnamento adottati. A giudizio di Bottai, infatti, i problemi concernenti «l'arte d'insegnare, così volentieri sdegnati dai taumaturghi dell'*ex cathedra*», non erano da considerare di secondaria importanza bensì da annoverare tra quelli da risolvere prioritariamente:

se d'una crisi soffre l'Università, e non in Italia soltanto, è d'una crisi di disciplina totale dei suoi metodi insegnativi, formati in tempi ben diversi dai nostri, per masse studentesche di dimensioni e qualità e aspirazioni dalle attuali differentissime. Il 'professionale' tende ormai a sopravanzare lo scientifico; e sopravanzando lo guasta, lo mina alle radici. Bisogna ristabilire l'equilibrio; e più che l'equilibrio: il netto, definitivo, incontrastato vantaggio dello 'scientifico'⁴².

La *Carta della Scuola*, secondo Bottai, cercava pertanto di provvedere al problema del crescente e insostenibile sovrappollamento degli atenei, alla più volte denunciata questione della scarsa qualità degli studi universitari, all'impellente necessità di trasformare gli esami di profitto, ormai ridotti ad un «gentiliano colloquio di anime»⁴³, in qualcosa di più oggettivo e tecnico e al soddisfacimento di una scrupolosa razionalizzazione delle spese sostenute dall'intero sistema universitario⁴⁴. Ecco perché il tentativo di riforma bottaiana dell'istruzione, tuttavia mai realmente concretizzatosi per il pressoché immediato scoppio della Seconda guerra mondiale, mirava a porre l'Università al culmine del percorso scolastico, quale luogo selettivo per eccellenza, dove «l'accesso agli studi e il loro proseguimento sono regolati esclusivamente dal criterio delle capacità e attitudini dimostrate», e nella quale il «principio della selezione opera di continuo, a salvaguardia della sua funzione e della particolarità dei suoi istituti» e necessario soprattutto per arginare l'assai diffuso e temibile fenomeno della disoccupazione intellettuale generato da una sempre più «lievitante pleora irrequieta di laureati»⁴⁵. Nel pensiero di Bottai, infatti,

⁴² Sull'importanza della didattica e sulla «pregevole arte dell'insegnare» Bottai sarebbe in parte tornato anche in un altro articolo pubblicato su «Gli Annali della Università d'Italia» e più precisamente nel contributo G. Bottai, *Formazione dei Centri didattici nella rinnovata Scuola fascista*, «Gli Annali della Università d'Italia», vol. 3, n. 2, 29 dicembre 1941, pp. 99-109. Tale intervento riprodotto sulle pagine del periodico era stato in realtà tenuto dal ministro Bottai il 28 ottobre 1941 a Firenze in occasione dell'inaugurazione del Primo Centro didattico Nazionale.

⁴³ Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, cit., p. 355.

⁴⁴ In tal senso può essere letto il contributo di U. Borsi, *Il riordinamento delle Facoltà universitarie ed i rapporti di ordine didattico fra le medesime*, «Gli Annali della Università d'Italia», vol. 1, n. 1, 29 ottobre 1939, pp. 71-79.

⁴⁵ Il sovrappollamento degli atenei e l'accresciuto numero di laureati furono oggetto di specifico approfondimento sulle pagine degli «Gli Annali della Università d'Italia», in particolare nei seguenti contributi: M. Udina, *L'ordine universitario e la Carta della Scuola*, «Gli Annali della Università d'Italia», vol. 1, n. 1, 29 ottobre 1939, pp. 85-94; M. Moresco, *L'affollamento degli Atenei*, «Gli Annali della Università d'Italia», vol. 3, n. 1, 29 ottobre 1941, pp. 3-8 e R. Del Giudice, *La limitazione delle iscrizioni universitarie*, «Gli Annali della Università d'Italia», vol. 4, n. 3, 28 febbraio 1943, pp. 162-168.

solo attraverso un «ordine supremo di studi saldamente gerarchizzati, legati e distinti da rapporti e ragioni precise, ben delineate», infatti, sarebbe stato possibile porre un freno e dare delle regole a quella pericolosa «tumultuosa corsa alla laurea» che di sicuro non avrebbe giovato in alcun modo alle nuove generazioni e alla società tutta⁴⁶.

Alla nuova rivista diretta da Giustini, secondo l'esplicita volontà del ministro, innanzitutto il compito primario di avviare una feconda discussione sui tanti problemi che attanagliavano da tempo l'istruzione superiore; quindi, in seconda battuta, la ricerca di un impegno comune e condiviso da parte di tutti i collaboratori del periodico nell'individuare possibili percorsi e soluzioni concrete per agevolare «un mutamento *ab imis* dell'Università»⁴⁷, funzionale alle nuove esigenze del Paese.

Proprio per soddisfare tale secondo obiettivo lo stesso Bottai nel *Discorso inaugurale della XXVIII riunione della Società Italiana per il Progresso delle Scienze*, pronunciato l'11 ottobre 1939 a Pisa e riprodotto in apertura del secondo fascicolo degli «Gli Annali della Università d'Italia» con il titolo *Scienza e Nazione*, ribadiva quanto, a suo parere, fosse sempre più opportuna una stretta collaborazione tra il mondo della scienza, comprendente ovviamente anche l'intera comunità accademica italiana, e lo Stato, affinché gli scienziati e gli uomini di cultura imparassero a non limitarsi soltanto alla pura dimensione teorica delle loro ricerche, ma anche ad avanzare proposte pratiche tecniche e produttive, che fossero ben collegate alle esigenze politiche, economiche, sociali e coloniali della Nazione.

Così quello che a noi oggi preme di chiedere alla scienza italiana sul terreno politico – affermava Bottai – è non solo una civica lealtà degli uomini che la esercitano (il che è normale, naturale, logico) quanto una sua validità universale, che persuada o pieghi a una legge, a una scoperta, a un ritrovato, a un brevetto italiano, le altre Nazioni e gli altri popoli. [...] Certamente [...], come Mussolini ha detto, [la Nazione] ha bisogno dell'opera tenace di pazienti ricercatori. Ed ecco dove il carattere nazionale della scienza si rivela appieno: nell'organizzazione della ricerca. Dall'individuo al laboratorio, dal laboratorio-cella al laboratorio cellula, si rivela la personalità d'ogni Stato nella ricerca scientifica.[...] La Scienza serve lo Stato direttamente, come l'arte, in quanto momenti di civiltà; ma serve lo Stato, deve servirlo, mediamente traverso la tecnica. Meglio ancora, serve le esigenze tecniche dello Stato⁴⁸.

⁴⁶ Sul tema sarebbe intervenuto anche Agostino Gemelli nei seguenti contributi: *Il problema degli esami di profitto e di laurea nelle università*, «Gli Annali della Università d'Italia», vol. 1, n. 1, 29 ottobre 1939, pp. 48-59; *Orientamento e selezione nell'università*, «Gli Annali della Università d'Italia», vol. 2, n. 1, 29 ottobre 1940, pp. 18-29 e *Orientamento e selezione nell'università. Come si pone e come si risolve il problema in Italia*, «Gli Annali della Università d'Italia», vol. 2, n. 3, 28 febbraio 1941, pp. 18-29.

⁴⁷ Bottai, «*L'Università nella Carta della Scuola*», cit., p. 11.

⁴⁸ G. Bottai, *Scienza e Nazione*, «Gli Annali della Università d'Italia», vol. 1, n. 2, 29 dicembre 1939, pp. 149-153 (la citazione è alle pp. 151-153). Al rapporto tra scienza e università durante il regime fascista sarebbe stato dedicato nel 1943 un intero numero speciale de «Gli Annali della

A sostegno delle significative riflessioni avviate dal ministro circa la necessità di un nesso stretto tra il mondo della cultura, e quindi dell'Università, e la dimensione produttiva e lavorativa del Paese, nel terzo fascicolo degli «Gli Annali della Università d'Italia» fu invitato ad intervenire anche Giuseppe Volpi di Misurata, ex ministro delle Finanze del governo Mussolini ed in quegli anni presidente della Confederazione Fascista degli Industriali⁴⁹, che si faceva portavoce del pensiero e delle idee del mondo imprenditoriale italiano e che, grazie al suo contributo offerto alla rivista, assecondava pienamente i *desiderata* di Bottai di coinvolgere nel dibattito sull'istruzione superiore non solo gli accademici e gli uomini di cultura ma anche gli alti esponenti della vita politica ed economica italiana.

Nel suo articolo, dal titolo, *L'Università e la vita industriale della Nazione*⁵⁰, Volpi di Misurata sottolineava preliminarmente come l'Università dovesse essere oggetto di attenzione privilegiata da parte di tutti coloro che ricoprivano un ruolo di primo piano nella vita nazionale e pertanto, proprio per questo motivo, il mondo imprenditoriale, schierato sempre più in prima linea nello sviluppo del regime, non poteva non interessarsi alle vicende precipue dell'istruzione superiore:

La funzione che l'Università compie nella vita nazionale è così importante e significativa per tutti i settori di attività, che nessun uomo chiamato a svolgere compiti direttivi nella vita nazionale medesima, per distante che lo tengano le occupazioni quotidiane dalle aule e dai laboratori ove si foggiano i futuri dottori, può dire di non essersi avvicinato, se non altro con il pensiero, sotto lo stimolo delle esigenze del suo stesso compito, ai problemi dell'organizzazione dei nostri studi universitari. [...] Come Presidente della Confederazione Fascista degli Industriali, posso dire che l'Università è sempre presente alla mia attenzione come la silenziosa officina della quale vengono forniti quei giovani che, nell'avvicinarsi delle generazioni, assicurano continuità della categoria industriale, così gloriosa, in Italia, per tradizioni di genialità e di tecnica.

Quindi egli entrava nel cuore del discorso, ponendo il proprio *focus* sull'apporto fondamentale che in quel preciso momento storico l'Università era chiamata a fornire al progresso della Nazione e sull'opportunità che essa stabilisse o rafforzasse solidi e fruttuosi legami con il mondo del lavoro.

Università d'Italia», quando però ormai Bottai non era più ministro dell'Educazione Nazionale. Si veda *Scienza e università italiane in un ventennio di Regime fascista*, «Gli Annali della Università d'Italia», vol. 4, n. speciale, 21 aprile 1943. Si veda in proposito l'interessante sintesi offerta in Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, cit., pp. 362-367.

⁴⁹ Giuseppe Volpi, conte di Misurata fu governatore della Tripolitania italiana dal 1921 al 1925, ministro delle Finanze del governo Mussolini dal 10 luglio 1925 al 9 luglio 1928 e presidente della Confederazione Fascista degli Industriali dal 1934 al 1943. Su di lui si veda in particolare S. Romano, *Giuseppe Volpi: industria e finanza tra Giolitti e Mussolini*, Milano, Bompiani, 1979.

⁵⁰ G. Volpi di Misurata, *L'Università e la vita industriale della Nazione*, «Gli Annali della Università d'Italia», vol. 1, n. 3, 29 febbraio 1940, pp. 257-264. Le successive citazioni sono tratte da tale articolo.

Ho accolto l'invito di esprimere il mio pensiero sui rapporti fra Università e vita industriale [...] nell'ora attuale in cui la scuola italiana viene assumendo i precisi caratteri del Fascismo espressi nella Carta della Scuola, che s'innalza a fianco della gloriosa Carta del Lavoro, come uno dei massimi documenti della nostra Rivoluzione.

Proprio per raggiungere tali ambiziosi e non più procrastinabili obiettivi era quanto mai necessario un sistema universitario al passo con i tempi, soprattutto con riferimento ad un rinnovamento dell'offerta formativa che tenesse ben in considerazione le reali esigenze da soddisfare in un'Italia sempre più desiderosa di crescita economica e incentivasse l'iscrizione anche a facoltà meno tradizionali. In particolare, secondo il presidente della Confederazione Fascista degli Industriali, pur senza voler disconoscere il ruolo di primo piano da sempre occupato dalla cultura e dagli studi umanistici nella tradizione accademica italiana, era arrivato il momento di investire coraggiosamente anche e soprattutto sulle facoltà tecniche (tra cui in particolare Chimica, Ingegneria, Architettura ed Agraria), al fine di favorire la crescita del numero di laureati, funzionali al momento di grande sviluppo industriale e tecnologico, e scongiurare così il pericolo di arretratezza rispetto alle altre nazioni.

I tecnici formati dalle Università italiane sono di primissimo ordine e di essi non si sa se ammirare di più la preparazione scientifica generale o la sviluppata versatilità per cui aderiscono alla pratica e ne risolvono i problemi. Tuttavia chiunque osservi la distribuzione numerica degli studenti universitari per Facoltà, con occhio sincero, non può non rimanere impressionato dal fatto che le Facoltà tecniche assorbono una frazione molto modesta di essi. [...] È singolare che la frequenza delle lauree tecniche, in un momento di grande sviluppo industriale, cresca meno di quella delle lauree in giurisprudenza e scienze politiche. [...] Le cause della deficienza ora denunciata sono indubbiamente complesse e non imputabili soltanto all'organizzazione degli studi, ma anche ad abitudini e costumi della nostra vita; tuttavia le cause relative all'organizzazione universitaria sono assai importanti e comunque interessano particolarmente in quanto possono essere più facilmente eliminate. Ecco dunque che [...] l'importanza dell'adeguatezza delle Facoltà universitarie alle esigenze della vita pratica appare evidente a chi si soffermi, anche un solo istante con il pensiero, sulla vastità della zona di contatto che si ha nella vita moderna fra scienza e pratica.

In chiusura del suo intervento Volpi di Misurata auspicava pertanto che l'opera di riforma prospettata da Bottai potesse trovare felice applicazione anche alla luce della «lungimiranza» palesata dal ministro nell'individuare problematiche e carenze dell'intero sistema universitario italiano e nel denunciare (e tentare di colmare) la distanza spesso troppo marcata tra il mondo dell'Università e quello economico-produttivo.

Il valore di una simile rispondenza [tra mondo universitario e mondo economico] non è soltanto da scorgersi – concludeva Volpi di Misurata – nella migliore adeguatezza degli studi ai bisogni della produzione che essa porterebbe, ma ancor più nel contributo che l'evoluzione accennata darebbe a quella rivoluzione dello spirito italiano, da cui questo riceve una maggiore e più severa vigoria creativa, che la ferma e sapiente volontà del Duce guida senza discontinuità verso il suo grandioso e perfetto compimento.

Il mondo accademico, dunque, era sollecitato da più parti ad assumersi nuove responsabilità al fine di contribuire fattivamente alla crescita dell'Italia fascista. Per riuscire nell'intento era necessaria l'auspicata «rivoluzione» bottaiana grazie alla quale finalmente a tutta la Scuola ed in particolare all'Università sarebbero stati conferiti precisi ed inderogabili compiti da svolgere. Agli operatori economici ed industriali e soprattutto agli intellettuali di varie branche del sapere il dovere inderogabile di sostenere il ministro in quest'opera di radicale cambiamento dell'istruzione. Non a caso, a fare eco al pensiero di Bottai, intervennero sugli «Gli Annali della Università d'Italia» non poche personalità di spicco del tempo. Tra queste, in particolare, si ricorda l'economista e docente universitario Celestino Arena, già animatore della *Scuola di perfezionamento in studi corporativi* e collaboratore attivo della prestigiosa rivista «Archivio di studi corporativi», fondata nel 1930 proprio da Bottai⁵¹. L'allora membro del Consiglio nazionale dell'educazione, su specifico invito del ministro, suo amico fraterno, pubblicò sulla rivista diretta da Giustini un significativo intervento dal titolo «Funzione politica dell'Università»⁵², in cui, più che altrove, è possibile ritrovare mirabilmente sintetizzato il pensiero di fondo che animava in quel periodo l'azione del titolare della Minerva in tema di istruzione universitaria. Come ribadiva Arena, infatti, l'Università doveva necessariamente essere considerata la realtà «depositaria e formatrice dell'alta cultura della nazione», in perfetta sintonia «con l'affermazione dei nuovi ideali di vita politica e sociale». Suo compito precipuo era servire tali ideali in tre modi: «educando un' eletta classe dirigente, illuminandone l'azione per l'affermazione di un inconfondibile tipo di civiltà, elaborando, di questa, formule capaci di promuovere l'espansione morale e materiale della nazione nel mondo».

Come più volte già messo in rilievo da Bottai, Arena riconosceva all'istruzione superiore, in maniera pressoché esclusiva rispetto ad ogni altro ordine di scuola,

⁵¹ Celestino Arena è stato un importante economista italiano, docente di materie giuridico-economiche nelle università di Pisa, Napoli e Roma. Egli fu altresì tra gli animatori della *Scuola di perfezionamento in studi corporativi* e collaborò assiduamente alla rivista «Archivio di studi corporativi», fondata nel 1930 proprio da Giuseppe Bottai. Arena, che nella seconda metà degli anni Quaranta del Novecento partecipò alla politica attiva del Paese nelle file della Democrazia cristiana, ricoprì anche numerosi incarichi istituzionali a partire dagli anni Cinquanta. Egli, infatti, fece parte del Consiglio superiore della Pubblica Istruzione (1955-60), del Consiglio di amministrazione delle Ferrovie dello Stato (1954-59), del CNEL (Consiglio Nazionale dell'Economia e del Lavoro), nel quale presiedette la Commissione comunicazioni e lavori pubblici (1958-61), della Commissione per lo schema organico di sviluppo nazionale dell'occupazione e del reddito (1959-61), del Comitato plenario per la relazione generale sulla situazione economica del paese, del Comitato direttivo dell'Istituto per la contabilità nazionale, del Consiglio di amministrazione dell'Istituto regionale per il finanziamento dell'industria in Sicilia, della Commissione regionale per il risanamento dell'industria zolfifera siciliana e della Commissione tecnico-legislativa per i problemi della montagna. Su di lui si veda in particolare G. Melis, *Arena Celestino*, in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1988, vol. 34, pp. 170-173.

⁵² G. Arena, *Funzione politica dell'Università*, «Gli Annali della Università d'Italia», vol. 1, n. 3, 29 febbraio 1940, pp. 288-293. Le successive citazioni sono tratte da tale articolo.

un alto ruolo formativo, elemento indispensabile nel processo di realizzazione di una «nuova società compiutamente fascista».

L'Università deve formare cittadini dalla personalità integrale – scientifica professionale politica e morale, educata a un concetto vivo e moderno della cultura e della vita, pronta alla piena sensibilità dei problemi nazionali, partecipe della tensione ideale di tutto un popolo; formare la volontà di uomini giusti e intrepidi, approfondirne i valori, per arricchire di questi il patrimonio spirituale della nazione. La scuola universitaria sarà formatrice nel miglior senso della parola, strumento di formazione del carattere e insieme espressione di una civiltà, se invece dell'istruzione che non educa, della luce lunare che illumina ma non riscalda, darà opera che vivifichi e rinnovi le profonde energie della nazione, svegli e svolga le attitudini, al servizio della società e dello Stato.

Naturalmente per svolgere al meglio l'impegnativo e ambizioso compito attribuitole, l'Università era invitata ad abbandonare il tradizionale *status* di «organismo chiuso e privilegiato», ponendosi invece come «mediatrice fra le varie forze della Nazione, selezionatrice e valorizzatrice delle forze vitali di questa, ovunque si trovino»⁵³. Scevra dall'essere «pura pertinenza e possesso di una società borghese lontana dallo Stato»,

l'Università – sottolineava Arena – deve selezionare l'intelligenza del paese e renderla capace del governo della cosa pubblica: i ceti finora esclusi devono essere messi in condizione di penetrare nella classe dirigente con i migliori elementi; e, d'altra parte, gli elementi meno buoni della classe dirigente devono essere per rigorosa selezione respinti verso gli strati inferiori. Così di continuo si ravviva la classe dirigente delle fresche energie che meglio si accumulano in ceti ad essa estranei, e che sono tra le forze più sicure della dinamica popolare, [...] secondo un naturale ma lungo e penoso processo di selezione, finalizzato a [...] rendere il popolo, tutto il popolo, degno di entrare e restare coi suoi migliori negli ordini gerarchici dello Stato.

Solo operando in tal guisa e assolvendo a tale precisa e prioritaria funzione politica, gli istituti di istruzione superiore avrebbe assicurato non soltanto il «progresso scientifico» ma anche lo «sviluppo integrale» della Nazione, «imprimendo lo stampo dell'alta cultura, o almeno della cultura, a tutte le forze della vita nazionale»⁵⁴.

In quest'opera auspicata da Bottai nella *Carta della Scuola* e ben sintetizzata da Arena di trasformazione dell'Università «in uno dei più potenti presidi della Nazione, veicolo dell'espansione nel mondo della cultura caratteristica della nuova civiltà fascista», una funzione di rilievo strategica era riservata alle università cosiddette «minori»⁵⁵, ritenute dal ministro dell'Educazione Nazionale

⁵³ *Ibid.*, p. 289. Sul medesimo tema si veda anche C. Curcio, *Funzione rivoluzionaria della cultura universitaria*, «Gli Annali della Università d'Italia», vol. 2, n. 3, 28 febbraio 1941, pp. 217-220.

⁵⁴ Arena, *Funzione politica dell'Università*, cit., p. 293.

⁵⁵ Sulle università cosiddette «minori» si vedano in particolare I. Porciani, *La questione delle piccole università dall'unificazione agli anni Ottanta*, in M. Da Passano (ed.), *Le Università minori*

«una risorsa inesauribile ed imprescindibile» a cui il regime fascista avrebbe dovuto necessariamente attingere. Non a caso lo stesso Bottai già il 26 marzo 1938, nel discorso pronunciato al Senato del Regno *Sul bilancio dell'Educazione Nazionale* dell'anno 1938-1939⁵⁶, aveva avuto modo di evidenziare come tra gli obiettivi primari del ministero vi fosse quello di «riattivare al massimo le funzioni delle piccole sedi universitarie», meno affollate numericamente e sorte e sviluppatesi in centri territoriali più decentrati, ma, a giudizio del ministro, luogo ideale per favorire «il religioso raccoglimento negli studi non più possibile nelle grandi città»⁵⁷. Nel febbraio del 1940, sulle pagine degli «Gli Annali della Università d'Italia», lo storico e giurista Alessandro Visconti⁵⁸, con un contributo dal titolo *Le Università così dette minori e la loro missione culturale*⁵⁹ in piena sintonia contenutistica con il pensiero di Bottai, richiamò l'attenzione dei lettori sull'importanza, nell'ottica di una riforma globale dell'Università, delle sedi «minori», solitamente in maniera «ammirevole e quasi commovente sostenute dalle sole energie locali», e soprattutto simbolo per eccellenza della gloriosa storia plurisecolare del sistema universitario italiano che la dittatura fascista intendeva rinverdire e porre tra le giustificazioni primarie alla base dell'auspicata «rivoluzione universitaria» bottaiana.

Vi sono Atenei – scriveva Visconti nel suo contributo – che, per la loro situazione in grandi città, attirano una numerosa popolazione scolastica, e l'apparente floridezza si risolve talvolta in un danno per gli studi, specialmente nelle scienze, dove l'esperienza del laboratorio è la base dell'insegnamento. Vi sono invece Atenei in città provinciali dove gli studenti sono relativamente pochi: là il Maestro è in continuo contatto con loro; i laboratori e le cliniche sono più accessibili alla massa; e l'insegnamento è più efficace.

in Italia nel XIX secolo, Sassari, Centro interdisciplinare per la storia dell'Università di Sassari, 1993, pp. 9-10; G.P. Brizzi, *Le università minori in Italia in età moderna*, in A. Romano (ed.), *Università in Europa. Le istituzioni universitarie dal Medio Evo ai nostri giorni: struttura, organizzazione, funzionamento, Atti del Convegno Internazionale di Studi (Milazzo, 28 settembre-2 ottobre 1993)*, Soveria Mannelli, Rubbettino, 1995, pp. 287-296; Id., *Le università minori in Italia. Identità e autoconsapevolezza*, in G.P. Brizzi, J. Verger (edd.), *Le Università minori in Europa (secoli XV-XIX). Atti del Convegno Internazionale di Studi (Alghero, 30 ottobre-2 novembre 1996)*, Soveria Mannelli, Rubbettino, 1998, pp. 169-188; M. Moretti, *Piccole, povere e "libere": le università municipali nell'Italia liberale*, in Brizzi, Verger (edd.), *Le Università minori in Europa (secoli XV-XIX). Atti del Convegno Internazionale di Studi (Alghero, 30 ottobre-2 novembre 1996)*, cit., pp. 533-562; G. Fois, *Storia dell'Università di Sassari (1859-1943)*, Roma, Carocci, 2000; A. Mattone (ed.), *Storia dell'Università di Sassari*, 2 voll., Nuoro, Ilisso, 2010; L. Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013.

⁵⁶ G. Bottai, *Sul bilancio dell'educazione nazionale. Dal discorso pronunciato al Senato del Regno nella seduta del 26 marzo 1938*, in Bottai, *La Carta della Scuola*, cit. pp. 135-143.

⁵⁷ *Ibid.*, pp. 142-143.

⁵⁸ Alessandro Visconti è stato un raffinato e importante docente di Storia del diritto italiano nelle università di Macerata, Ferrara e Pavia.

⁵⁹ A. Visconti, *Le Università così dette minori e la loro missione culturale*, «Gli Annali della Università d'Italia», vol. 1, n. 3, 29 febbraio 1940, pp. 283-287. Le successive citazioni sono tratte da tale articolo.

Questi atenei, nel corso della loro travagliata e difficoltosa esistenza, imputabile soprattutto, a giudizio di Visconti, ad «un'errata distribuzione geografica» delle varie sedi sul territorio italiano⁶⁰, avevano sempre fondato la propria forza, oltre che sull'ottimo ed ideale clima per lo studio riscontrabile in tali piccoli centri universitari, anche su un altro elemento di nodale importanza, ossia la loro «tradizione» pluricentenaria, aspetto che non poteva essere affatto trascurato da chi, come il fascismo, intendeva affondare le radici della propria potenza nei fasti e nello splendore dell'Italia di un glorioso tempo passato.

Un elemento etico di grandissimo momento è la tradizione; sia riguardo all'individuo, sia riguardo alle istituzioni. La gloria, la nobiltà degli Atenei è tutta nella loro tradizione. Più questa affonda le sue radici nel tempo e più ne cresce la considerazione: ma crescono altresì i doveri nei contemporanei per mantenere degnamente la propria Università all'altezza del suo passato. Ora, le così dette Università minori sono in genere assai antiche. Esse si ricollegano allo splendore dei Principati del Rinascimento protettori delle lettere e delle arti: esse si gloriano del nome di insigni scienziati, giuristi e letterati che onorarono le cattedre e lasciarono un nome difficilmente perituro⁶¹.

Proprio alla luce di tale riflessione circa il riconosciuto e consolidato elevato valore scientifico e accademico di tali atenei, Visconti, amplificando quanto detto da Bottai nel marzo 1938, sperava che si riuscisse a

⁶⁰ Sulla geografia accademica italiana nel corso dell'Ottocento e del Novecento si vedano in particolare: A. Trento, *Le università marchigiane durante il fascismo*, in *Aspetti della società marchigiana dal Fascismo alla Resistenza*, Urbino, Argalia, 1979, pp. 203-204; Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., *passim*; M. Moretti, *Sulla geografia accademica nell'Italia contemporanea (1859-1962)*, in L. Blanco, A. Giorgi, L. Mineo (edd.), *Costruire un'Università. Le fonti documentarie per la storia dell'Università degli Studi di Trento (1962-1972)*, Bologna, il Mulino, pp. 59-100.

⁶¹ Visconti, *Le Università così dette minori e la loro missione culturale*, cit., p. 285. Con riferimento a questo argomento appare opportuno sottolineare come un recente contributo di Roberto Sani abbia inaugurato un nuovo stimolante e interessante filone di studi. Lo storico dell'educazione, infatti, ha pensato bene di applicare la categoria storiografica dell'«invenzione della tradizione», tanto cara a Eric Hobsbawm e Terence Ranger, non più soltanto alle organizzazioni politiche e agli apparati statuali in senso stretto «ma anche a quelle istituzioni sociali e culturali maggiormente investite dai profondi e radicali mutamenti in atto e alle prese con la conseguente necessità di una nuova e più salda legittimazione del proprio ruolo e delle proprie prerogative e funzioni». E tra queste istituzioni sociali e culturali rientrano ovviamente anche le università e i gli istituti d'istruzione superiore con riguardo tuttavia non solo ai vetusti college delle università inglesi alle prese con i mutamenti prodotti in ambito culturale e scientifico dalla rivoluzione industriale, ai quali fa cenno Hobsbawm, ma anche le antiche e nuove università sorte in Germania e Francia nel corso del secolo XIX, come pure quella peculiare tipologia di «atenei minori» largamente diffusi nella penisola italiana e a cui rivolge la sua particolare attenzione lo stesso Sani. Si veda in proposito R. Sani, *The invention of tradition in the minor Universities of united Italy. The case of the thirteenth-century origins of the Studium Maceratense*, «History of Education & Children's Literature», vol. 7, n. 1, 2012, pp. 485-504.

potenziare questo legittimo orgoglio; bisogna che i giovani Maestri non si sentano diminuiti, se rimangono qualche anno in una Università meno popolosa [...]; persino invece che la loro missione sarà più feconda se svolta nel sereno ambiente propizio alla meditazione e allo studio, quale è quello che offre una città piccola, un numero limitato di allievi e un ritmo più lento della vita, favorevole al concepimento di opere profonde e dotte.

A tali università di provincia, «storicamente celebri», era pertanto assegnata «una nobile missione culturale da compiere per il progresso della scienza italiana» e per lo sviluppo della Nazione tutta. Non a caso, a conferma del «rinnovato clima d'interesse» nel Paese per la storia e la tradizione dei singoli atenei, in questo caso tuttavia non solo minori, Visconti richiamava quale esempio esplicativo la già ricordata iniziativa del ministro Bottai della *redigenda* collezione di monografie sulle università, ossia «far scrivere la storia delle Università italiane sotto il patrocinio stesso dello Stato», quale invito e «stimolo a ricercare nelle glorie passate la ragione d'essere nel presente [...] e a fare nuovi sforzi perché le Università siano degne della loro tradizione», nella consapevolezza che «la coscienza della tradizione, più che la ricchezza materiale, sia una leva morale di grande potenza per accender l'animo a cose egregie»⁶².

Gli articoli di Giuseppe Volpi di Misurata, di Celestino Arena e di Alessandro Visconti furono pubblicati nel fascicolo degli «Gli Annali della Università d'Italia» del 29 febbraio 1940. A distanza di poco più di un anno dall'avvio del progetto bottaiano delle monografie il fermento attorno ai problemi dell'istruzione superiore sembrava aver raggiunto livelli altissimi. Il momento appariva dunque quanto mai propizio affinché l'intera comunità accademica della penisola si prodigasse congiuntamente per il «rilancio concreto» dell'Università italiana. Proprio per questo motivo dal 5 al 7 aprile 1940 si svolse a Bologna il Primo Convegno nazionale per la storia delle università italiane, promosso dall'Istituto per la storia dell'Università di Bologna con un triplice obiettivo: coordinare i vari comitati storici sorti per effetto della circolare di Bottai presso le varie università, accelerare la realizzazione delle monografie in evidente ritardo di stesura rispetto alle disposizioni del ministro e iniziare a predisporre l'organizzazione di un imponente Congresso Internazionale sulla storia delle università, che si sarebbe dovuto tenere a Roma nel 1942 in occasione dell'Esposizione universale e che avrebbe permesso all'Italia di recuperare un ruolo di primo piano nel panorama universitario internazionale⁶³. In realtà, a causa delle note tragiche contingenze belliche il Congresso del 1942, promosso dall'Istituto per le relazioni culturali con l'estero, d'intesa con il ministero dell'Educazione Nazionale, non ebbe mai luogo ma produsse comunque il

⁶² Visconti, *Le Università così dette minori e la loro missione culturale*, cit., p. 287.

⁶³ Archivio storico dell'Università degli Studi di Bologna, posizione 78, Congressi, fasc. *Convegno italiano per la storia delle Università*.

risultato di aver determinato la convocazione del Convegno bolognese del 1940 chiamato a curare l'organizzazione dell'evento romano⁶⁴.

All'incontro nella città felsinea, che si svolse tra l'Aula Magna dell'Ateneo e il Palazzo dell'Archiginnasio di Bologna, oltre alle autorità accademiche bolognesi e ai rappresentanti politici locali del Partito Nazionale Fascista⁶⁵, parteciparono tutte le università italiane e gli istituti assimilati⁶⁶, solitamente rappresentati da coloro che erano stati incaricati di redigere le monografie, tra i quali si ricordano in particolare Luigi Dal Pane per Bari, Luigi Simeoni e Albano Sorbelli per Bologna, Michele Catalano per Catania, Silvio Vismara per la Cattolica del Sacro Cuore di Milano, Alessandro Visconti per Ferrara, Adolfo Bertagni per Firenze, Gian Piero Bognetti per Genova, Antonio Marongiu per Macerata, Camillo Giardina per Messina, Carlo Guido Mor per Modena, Romualdo Trifone e Gennaro Maria Monti per Napoli, Carlo Anti e Roberto Cessi per Padova, Pietro Vaccari per Pavia, Ugo Gualazzini per Parma, Giuseppe Ermini per Perugia, Augusto Mancini per Pisa, Nicola Spano e Roberto Valentini per Roma, Antonio Era per Sassari, Sergio Mochi Onory per Siena, Mario Viora per Torino, Ferdinando Pasini per Trieste⁶⁷.

Lo stesso ministro Bottai non mancò di partecipare all'adunanza. Nel suo discorso, tenuto la mattina del 5 aprile dopo i saluti introduttivi del podestà di Bologna Enzo Fernè e del rettore dell'ateneo emiliano Alessandro Ghigi, e che fu anche riprodotto in apertura del fascicolo del 29 aprile degli «Gli Annali della Università d'Italia»⁶⁸, egli si preoccupò soprattutto di richiamare l'attenzione

⁶⁴ Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, cit., pp. 278-279. Del Congresso internazionale da tenersi a Roma nel 1942 già non si fa più alcuna menzione in N. Mazzaracchio, *La collezione delle monografie sulle Università d'Italia*, «Gli Annali della Università d'Italia», vol. 2, n. 5, 29 giugno 1941, pp. 448-452.

⁶⁵ Per il programma completo del convegno, l'ordine dei lavori e l'elenco dettagliato dei partecipanti e delle relazioni da essi presentate si vedano *Primo Convegno nazionale per la storia delle università italiane, promosso dall'Istituto per la storia dell'Università di Bologna (Bologna, 5-7 aprile 1940). Ordine dei lavori*, Bologna, Azzoguidi, 1940 e A. Sorbelli, *Primo Convegno Nazionale per la Storia delle Università Italiane*, «Gli Annali della Università d'Italia», vol. 1, n. 4, 29 aprile 1940, pp. 420-423 (il testo è quasi uguale a quello riportato in Sorbelli, *Il primo Convegno Nazionale per la Storia delle Università italiane. Bologna, 5-7 aprile 1940 - XVIII*, cit.).

⁶⁶ Fu questo il caso dei Politecnici di Torino e di Milano, dell'Università Cattolica del Sacro Cuore di Milano, dell'Università Bocconi di Milano e dell'Istituto superiore di Economia e Commercio di Venezia.

⁶⁷ L'elenco completo di tutti coloro che parteciparono al convegno bolognese è tratto da Archivio storico dell'Università degli Studi di Bologna, posizione 78, Congressi, fasc. *Convegno italiano per la storia delle Università*. Non tutti i rappresentanti delle singole sedi tennero tuttavia una vera e propria relazione nei tre giorni del convegno ma tutti, comunque, presero parte alle specifiche riunioni dedicate all'analisi della situazione relativa alla stesura delle monografie. I lavori furono coordinati dal sen. Pier Silverio Leicht, presidente dell'Istituto per la Storia dell'Università di Bologna, e si protrassero dal primo pomeriggio del 5 aprile fino alla mattinata del 6. Agli incontri prese parte anche Giuseppe Giustini in qualità di Direttore generale dell'istruzione superiore (si veda Sorbelli, *Primo Convegno Nazionale per la Storia delle Università Italiane*, cit., p. 422).

⁶⁸ G. Bottai, *Per la Storia delle Università italiane. Discorso pronunciato il 5 aprile nell'Aula Magna della Università di Bologna dal ministro dell'Educazione Nazionale*, «Gli Annali della

degli intervenuti sulla necessità di portare quanto più seriamente e celermente avanti il tanto agognato progetto delle monografie (la stesura di queste era infatti in palese ritardo rispetto a quanto previsto dal ministro nel gennaio 1939), che rappresentava, a giudizio del titolare della Minerva, lo strumento primario attraverso il quale l'Università italiana, «tra le più gloriose istituzioni della Patria», avrebbe potuto far nuovamente «risplendere la sua luce in tutto il mondo civile». Ribaditi con dovizia di particolari la *ratio* di fondo che aveva ispirato l'opera, le sue finalità complessive, le caratteristiche editoriali precipue e la metodologia da seguire nella redazione dei testi⁶⁹, Bottai concludeva il suo intervento individuando distintamente due ulteriori auspicati «magnifici risultati» che, la concreta realizzazione delle monografie, avrebbero con ogni probabilità permesso di raggiungere:

L'uno è questo: tale collezione, per la contemporaneità della pubblicazione di tutte le Monografie e pel fatto ch'esse espongono lo stadio ultimo degli studi su questo importantissimo aspetto della vita spirituale italiana, potrebbe costituire la più solida base per la storia generale della Università italiana che noi. [...], che pur vantiamo le Università tra le più gloriose di Europa, non abbiamo. [...] E l'altro risultato è questo. Tra le solennità, che si predispongono, a Roma, in occasione della Esposizione Università del 1942, una, che per noi dev'essere del maggiore interesse, è il 1° Congresso internazionale per la Storia delle Università. La Scienza storica italiana ha il dovere di apportarvi un contributo di prim'ordine. Ora, la collezione, e come opera collettiva e come opera individuale, dovrà costituire uno dei fattori più appariscenti e più pregevoli di quel contributo⁷⁰.

Di fatto, *desiderata* del ministro a parte, il Convegno bolognese, oltre che a fare il punto sullo stato di avanzamento dei lavori per quanto concerneva la collezione di monografie sulle università⁷¹, servì soprattutto, come sottolineato

Università d'Italia», vol. 1, n. 4, 29 aprile 1940, pp. 353-358. Le successive citazioni sono tratte da tale articolo.

⁶⁹ Ad onor del vero è opportuno segnalare che l'intervento presentato da Bottai a Bologna per larga parte non faceva che riproporre, seppur spesso parafrasando, i medesimi contenuti della più volte ricordata circolare ministeriale del gennaio 1939 sulle monografie.

⁷⁰ Bottai, *Per la Storia delle Università italiane. Discorso pronunciato il 5 aprile nell'Aula Magna della Università di Bologna dal ministro dell'Educazione Nazionale*, cit., p. 358.

⁷¹ Il lavoro di stesura delle monografie, infatti, era decisamente in ritardo rispetto alla tempistica indicata dal ministro nel gennaio 1939 (si veda in proposito quanto riportato in Mazzaracchio, *La collezione delle monografie sulle Università d'Italia*, cit.) ed ovviamente i successivi avvenimenti bellici che videro protagonista l'Italia non contribuirono affatto a migliorare la situazione. Tuttavia, molte delle monografie promosse dal ministero furono comunque pubblicate autonomamente dai singoli autori o dalle università di appartenenza. Si vedano in proposito, solo per citare alcune opere di quelle portate a termine, A. Sorbelli, *Storia dell'Università di Bologna. Il Medioevo sec. XI-XV*, Bologna, Istituto per la storia dell'Università, 1940; L. Simeoni, *Storia dell'Università di Bologna. L'età moderna 1500-1888*, Bologna, Istituto per la storia dell'Università, 1940; A. Visconti, *La storia dell'Università di Ferrara 1391-1950*, Bologna, Zanichelli, 1950; G. Ermini, *Storia dell'Università di Perugia*, Bologna, s.e., 1947 (questa edizione fu poi ampliata alcuni anni più tardi e pubblicata per l'editore Leo Olschki di Firenze nel 1971); P. Vaccari, *Storia dell'Università di Pavia*, Pavia, Il Portale, 1948; C.G. Mor, *Storia dell'Università di Modena*, Modena, Tip. Modenese, 1952.

da Gian Paolo Brizzi, «a stabilire contatti meno occasionali fra quanti si occupavano di storiografia universitaria»⁷². In questo modo si mirava ad un incremento degli studi sulla storia dell'Università attraverso la costituzione di appositi centri locali per la storia universitaria e si cercava altresì di gettare le basi per avanzare proposte condivisibili tali da dare vita a quello che potremmo definire il primo timido tentativo di creare una fruttuosa rete di comunicazione e cooperazione tra i vari atenei del Paese, funzionale alla volontà bottaiana di rilancio complessivo dell'intero sistema universitario italiano⁷³.

Tutti gli auspici di Giuseppe Bottai in materia d'istruzione avrebbero ovviamente dovuto fare i conti con i tragici eventi bellici che di lì a poco avrebbero coinvolto anche l'Italia, a partire soprattutto dalla nota dichiarazione di guerra di Mussolini del 10 giugno 1940 che sancì il diretto coinvolgimento del Paese nel secondo conflitto mondiale⁷⁴.

La sera del 5 novembre dello stesso anno, in occasione della ripresa ufficiale del nuovo anno accademico, il ministro dell'Educazione Nazionale tenne un importante discorso radiofonico, intitolato *Ripresa della vita universitaria*⁷⁵, rivolto a tutte le componenti della vita universitaria italiana affinché fosse comune la percezione di quanto, soprattutto nel corso degli anni più recenti e principalmente a livello quantitativo, l'Università avesse mutato sensibilmente la propria fisionomia. Tale intervento, che seguiva di fatto una circolare ministeriale del 20 ottobre inviata ai rettori e inerente il problema della disciplina universitaria⁷⁶, tracciava infatti un eloquente bilancio del sistema d'istruzione superiore italiano con l'indicazione esatta del numero di atenei e facoltà esistenti sull'intero territorio⁷⁷ e delle cifre, pressoché raddoppiate negli ultimi dieci anni, di studenti iscritti e di lauree conseguite⁷⁸. Inevitabilmente, di

⁷² Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, cit., p. 279.

⁷³ In tal senso deve essere letta la proposta avanzata durante il convegno bolognese da Carlo Guido Mor di creare, grazie all'apporto congiunto dei vari atenei, un Centro nazionale per la storia della scuola in Italia (si veda C.G. Mor, *Per un Centro nazionale sulla della scuola in Italia*, «Gli Annali della Università d'Italia», vol. 3, n. 6, 29 agosto 1942, pp. 457-461). Sempre durante l'incontro felsineo fu altresì accolto l'invito del rettore dell'Università di Padova, Carlo Anti, di individuare nell'Ateneo veneto, la sede per lo svolgimento del secondo convegno nazionale.

⁷⁴ Per un'analisi dettagliata ed esaustiva dell'entrata in guerra dell'Italia si veda R. De Felice, *Mussolini il Duce*, 2 voll., vol. 1: *Lo Stato totalitario 1936-1940*, Torino, Einaudi, 1981, pp. 794-844.

⁷⁵ G. Bottai, *Ripresa della vita universitaria*, «Gli Annali della Università d'Italia», vol. 2, n. 2, 29 dicembre 1940, pp. 99-103.

⁷⁶ Tale circolare, intitolata *Disciplina universitaria*, è reperibile «Gli Annali della Università d'Italia», vol. 2, n. 1, 29 ottobre 1940, pp. 58-63. Le successive citazioni sono tratte da tale articolo.

⁷⁷ In quel preciso momento gli atenei italiani (tra università vere e proprie e istituti universitari) erano trentasette per un totale di centosessantasei facoltà, tre scuole speciali, duecentocinquantanove scuole e corsi di perfezionamento e specializzazione (*ibid.*, p. 100).

⁷⁸ Gli studenti degli atenei italiani erano passati dalle cinquantanove mila unità dell'anno accademico 1934-1935 alle novantamila unità dell'anno 1940-1941 (*ibid.*, pp. 100-101).

fronte all'evidente e consistente aumento numerico delle dimensioni dell'intero sistema e della mutata e accresciuta richiesta d'istruzione superiore da parte del popolo italiano, sempre più desideroso di titoli per tentare di garantirsi l'accesso alle professioni, l'Università era chiamata a non rimanere inerme e a rivedere immediatamente i propri meccanismi interni di funzionamento.

Centomila studenti sono un grosso numero – scriveva Bottai –, che comporta problemi di quadri e di mezzi, di locali, di laboratori, di stromenti didattici e scientifici, di biblioteche e di opera d'assistenza; che esige, soprattutto, un'organizzazione continua e sollecita, dal materiale al morale, molto diversa da quella occorrente ai raccolti 'Studii' d'un tempo, che potevano, perché di minoranze, fondarsi su di un costume di libertà, facilmente controllabile e regolabile. 'Libera' università, 'libera' professione. Ma fino a qual punto quest'ultima, nella complicata e serrata struttura economico-sociale del nostro tempo, può dirsi ancora 'libera'? E può l'Università, pur nella sua prevalente funzione scientifica, rifiutarsi di corrispondere alle mutate condizioni del mondo, che le sta d'attorno?

Da questo inequivocabile quadro descritto scaturiva una precisa «operazione» che l'Università era chiamata a compiere e che Bottai, sulla medesima lunghezza d'onda di quanto già proposto nella *Carta della Scuola*, riteneva necessaria per restituire la giusta dignità e l'adeguato valore ad un'istituzione formativo di così grande prestigio e tradizione:

S'ha da agire sul numero non dall'esterno, ma dall'interno, secondo quel principio di selezione, che la 'Carta' mussoliniana mette a fondamento della Scuola fascista. C'è, senza dubbio, un'inflazione della laurea, riflesso della deformazione borghese della funzione della Scuola. Spingere tutti, in massa, all'alta cultura, significa portare la cultura a livello di tutti; quindi, abbassarla. Mentre si tratta di portarvi, senza limitazioni di numero, i capaci, scelti con esatte, caute, severe misure. S'ordini, dunque, l'Università a una siffatta disciplina. E non s'attendano leggi. Queste verranno; ma il costume le preceda.

Tornava pertanto, anche in questa occasione, il concetto più volte espresso dal ministro dell'Educazione Nazionale di un'Università chiamata a selezionare gli studenti sulla base delle reali capacità dell'individuo al fine di poter così plasmare la nuova classe dirigente fascista. Bottai, probabilmente più di altri ministri, aveva infatti perfettamente compreso che il sistema universitario italiano, per poter recuperare il suo carattere altamente formativo, affrontare in maniera competitiva le nuove sfide che la società coeva poneva e soddisfare appieno le esigenze delle Nazioni, era costretto a cambiar pelle radicalmente. Affinché ciò avvenisse era tuttavia necessario che il «problema universitario», considerato dal titolare della Minerva tra i «problemi essenziali della vita nazionale», divenisse oggetto di particolare interesse dell'intero mondo intellettuale italiano, non solo accademico, che aveva l'obbligo di studiare «il caso» e prospettare proposte, ipotesi e soluzioni.

Proprio per questo motivo nel 1941, attraverso la rivista da lui fondata e codiretta insieme a Giorgio Vecchietti, «Primato, lettere e arti d'Italia»⁷⁹, che chiamò a raccolta circa duecentocinquanta tra i più importanti intellettuali affinché dessero il loro contributo e sostenessero il «primato» dell'Italia anche in vista dell'approssimarsi della guerra, Bottai promosse un interessante e corposo dibattito sul tema *Le università e la cultura*, che prese avvio nel numero del 15 febbraio 1941 e si concluse in quello del 1° giugno dello stesso anno, interessando dunque ben otto fascicoli della rivista.

Obiettivo dell'iniziativa voluta da Bottai era quello di coinvolgere intellettuali di diversa provenienza e formazione intorno al complesso rapporto esistente fra le università e la cultura, trasformando di fatto il «problema universitario» in «problema di cultura», al fine di proporre al lettore una molteplicità di interpretazioni fatte di opinioni differenti e talvolta anche discordanti che dimostrassero anche la capacità di «Primato» di «accogliere, ascoltare e proporre una pluralità di osservazioni sul mondo dell'educazione, della scuola e della ricerca e sulle relazioni che esso intratteneva o avrebbe dovuto sviluppare con le tante ed innovative iniziative culturali che si erano sviluppate nella società»⁸⁰.

Nel corsivo che apriva il dibattito sul numero del 15 febbraio⁸¹, ma che in realtà costituiva anche l'ossatura del testo della lettera che i direttori della rivista avevano inviato nei mesi addietro ai vari intellettuali quale invito a partecipare dalla discussione, è possibile cogliere appieno la *ratio* alla base dell'iniziativa e gli obiettivi che il ministro intendeva prefiggersi con essa:

La nostra rivista è sorta col fermo proposito di contribuire al chiarimento dei problemi culturali che interessano la vita presente della Nazione e col vivo desiderio di sollecitare una più intima collaborazione tra i diversi settori del mondo intellettuale italiano, intende oggi promuovere un ampio scambio di idee sul problema universitario. Infatti, nella scuola in generale e sulle Università in particolare, in Italia si è sempre discusso con profondo interesse. Ora, per le presenti condizioni della nostra cultura e per i compiti che le potranno domani venire affidati, uno dei problemi essenziali della vita nazionale, è indubbiamente quello universitario. [...] Da esso discendono gli orientamenti essenziali di tutta la vita scolastica, [...] nelle università più diretto si fa il contatto di quella cultura con tutta l'altra cultura e con la vita della Nazione.

⁷⁹ La rivista «Primato, lettere e arti d'Italia» fu fortemente voluta da Giuseppe Bottai, diretta dallo stesso con la collaborazione di Giorgio Vecchietti e di Giorgio Cabella. Essa fu pubblicata dal marzo 1940 all'agosto 1943, durante la Seconda guerra mondiale, nel complesso periodo storico della crisi del partito e del regime fascista. Su «Primato, lettere e arti d'Italia» si vedano, tra gli altri, soprattutto gli interessanti lavori di V. Zagarrìo, *Primato: arte, cultura, cinema del fascismo attraverso una rivista esemplare*, Roma, Edizioni di storia e letteratura, 2007 e L. Tronfi, *Il «Primato» di Giuseppe Bottai: cultura e politica (1940-1943)*, Ravenna, Moderna Edizioni, 2012 (e-book).

⁸⁰ Sui contenuti del dibattito *Le università e la cultura* si vedano in particolare Zagarrìo, *Primato: arte, cultura, cinema del fascismo attraverso una rivista esemplare*, cit., 75-82 e Tronfi, *Il «Primato» di Giuseppe Bottai: cultura e politica (1940-1943)*, cit., pp. 261-294 (la citazione è a p. 261).

⁸¹ *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 4, 15 febbraio 1941, p. 6. Le successive citazioni sono tratte da tale contributo.

Intento dichiarato della redazione della rivista, tuttavia, non era quello di affrontare il problema universitario dal punto di vista meramente tecnico, occupandosi ad esempio della scarsa frequenza dei giovani alle lezioni, del numero troppo vasto o troppo ristretto degli atenei e delle facoltà, dell'accresciuta pletera delle scolaresche o dell'eventuale insufficienza di dotazioni e laboratori, bensì quello di attirare l'attenzione dei lettori

sul problema universitario inteso come problema di cultura: un incontro di giudizi, di testimonianze, di suggerimenti da parte di uomini che vivono nella Scuola ed anche fuori della Scuola, ma che sono tutti – in egual misura – partecipi dell'alta vita culturale del Paese.

Sul metodo con cui condurre il contraddittorio fra le differenti opinioni, il periodico si limitava ad indicare alcuni punti e problemi che, senza vincolare gli autori, erano ritenuti i più importanti ai fini della discussione:

i rapporti tra cultura universitaria e cultura extrauniversitaria, se vi sia o no un distacco fra le due culture, quali ne sono le ragioni e i caratteri, e come si può giungere ad un loro fecondo incontro; come le due culture si riflettano nell'orientamento dei giovani; quali sono gli aspetti attuali della tradizione 'nazionale' delle Università italiane; se e come sia possibile, in uno Stato corporativo, una ripartizione di compiti e funzioni tra le varie Università; come, specie in riferimento ai problemi dell'espansione culturale, si pongano oggi i rapporti tra 'nazionalismo' e 'internazionalismo'.

L'invito a partecipare al dibattito era rivolto innanzitutto «ad alcuni fra i migliori esponenti della cultura italiana per avere da essi non una risposta schematica ai punti segnalati, ma alcune libere considerazioni suggerite dalla loro esperienza, dentro e fuori le aule universitarie». Inoltre la redazione della rivista estendeva l'invito a partecipare «anche ad alcuni giovani, e giovanissimi e ad alcuni giornali universitari, per avere da essi la espressione più immediata delle esigenze spirituali e culturali delle nuove generazioni». L'auspicio era che dalle risposte pubblicate potesse scaturire

contemporaneamente un panorama vario, con valore ad un tempo critico e documentario, delle tendenze della nostra cultura. Se anche non irrisolti, alcuni problemi verranno almeno chiariti o additati. Nessun contributo – pur che sia intelligente ed onesto – può essere inutile.

Il dibattito promosso da «Primato», vuoi perché sostenuto in prima persona dal ministro Bottai vuoi per l'importanza del tema trattato, riscosse un notevole successo. Ad esso, infatti, presero parte alcuni tra gli uomini di cultura più autorevoli del tempo, tra i quali si ricordano in particolare Giovanni Gentile, Luigi Volpicelli, Luigi Russo, Armando Carlini e Giorgio Pasquali; taluni tra i più brillanti giovani emergenti di quegli anni, come Giaime Pintor, Sebastiano Timpanaro, Gianfranco Contini, Giansiro Ferrata e Giulio Carlo Argan, alcuni dei quali destinati a divenire esponenti di spicco della cultura democratica del

secondo dopoguerra, e le riviste ufficiali delle sezioni locali dei GUF (Gruppi Universitari Fascisti) di Padova, Bologna, Firenze, Roma e Pisa⁸².

Ovviamente un'iniziativa dalle proporzioni così ampie ed avente ad oggetto un tema così complesso e delicato era destinata a generare posizioni e chiavi di lettura molto eterogenee e spesso anche estremamente discordanti tra loro. Se, infatti, ad esempio, lo storico Carlo Morandi, collaboratore assiduo della rivista, sottolineava come, rispetto ai primi anni Venti la «roccaforte universitaria» avesse fatto molte aperture verso la società civile («anche troppo?») e la cultura extra-accademica avesse sensatamente abbandonato i toni polemici ed aggressivi del passato e riconosceva nei giovani del tempo un positivo «fermento di coscienze» ed una «esigenza morale di fronte a tutto ciò che essi avvertono di ambiguo, di incerto, di 'fatto male' nella vita di ogni giorno» in nome di «uno spirito rivoluzionario in senso costruttivo»⁸³, di parere ben diverso era il giornalista Manlio Lupinacci, a giudizio del quale la cultura universitaria e quella extra-universitaria rappresentavano due mondi culturali chiusi ermeticamente ed in alcun modo pronti al dialogo⁸⁴; ai giovani imputava invece un silenzio inquietante e una totale mancanza di spontaneità, e li reputava forti solo «di una baldanza che si guarda bene dal trasgredire alle norme della circolazione, che a ogni incrocio segue docile quanto rumorosa

⁸² Al dibattito promosso dalla rivista «Primato, lettere e arti d'Italia» parteciparono con le loro risposte: Carlo Morandi, Luigi Russo, Guido Piovene, Alberto de' Stefani, Mario Praz (vol. 2, n. 4, 15 febbraio 1941, pp. 6-9); Augusto Guzzo, Corrado Alvaro, Camillo Pellizzi, Manlio Lupinacci, «Il Bò» periodico dei GUF di Padova (vol. 2, n. 5, 1° marzo 1941, pp. 3-6); Giorgio Pasquali, Giulio Carlo Argan, Luigi Volpicelli, «Architrave» periodico dei GUF di Bologna (vol. 2, n. 6, 15 marzo 1941, pp. 4-7); Pompeo Biondi, Giaime Pintor, Armando Carlini, Gian Stuparich, «Rivoluzione» periodico dei GUF di Firenze (vol. 2, n. 7, 1° aprile 1941, pp. 3-7); Giovanni Battista Angioletti, Pier Maria Pasinetti, Giansiro Ferrata, Giuseppe Dessì (vol. 2, n. 8, 15 aprile 1941, pp. 4-6); Mimmo Sterpa, Giovanni Calendoli, Galvano Della Volpe, «Roma Fascista» dei GUF di Roma (vol. 2, n. 9, 1° maggio 1941, pp. 3-6); Giovanni Gentile, Sebastiano Timpanaro, Gianfranco Contini, «Il Campano» dei GUF di Pisa (vol. 2, n. 10, 15 maggio 1941, pp. 4-6). Nel numero 11 del 1° giugno 1941 furono invece pubblicate le conclusioni del dibattito redatte con ogni probabilità dai direttori del periodico, Giuseppe Bottai e Giorgio Vecchietti (vol. 2, n. 11, 1° giugno 1941, pp. 1-2). Nei vari numeri della rivista furono altresì annunciati gli interventi di intellettuali e periodici giovanili universitari che poi, in realtà, non furono mai pubblicati.

⁸³ C. Morandi, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 4, 15 febbraio 1941, pp. 6-7.

⁸⁴ A giudizio di Augusto Guzzo tale dialogo non era affatto necessario in quanto fra i diversi mondi della cultura era già presente una mutua penetrazione e pertanto erano insopprimibili «la dualità e la dialettica fra Università ed extra-Università, come quella fra Amministrazione e Partito, ma non poteva che essere una dialettica interna, entro una vita nazionale totalitaria» (A. Guzzo, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 5, 1° marzo 1941, p. 3). Decisamente più interessante e stimolante era invece per Giuseppe Dessì la cultura extra-universitaria, «la sola veramente efficace poiché in essa si potevano meglio cogliere i caratteri individuali e le tendenze in corso» (G. Dessì, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 8, 15 aprile 1941, p. 6).

la direzione dei cartelli indicatori e tiene la destra o la sinistra come vuole il metropolitano di turno»⁸⁵.

Non pochi furono altresì gli intellettuali che provarono a individuare quale fosse il vero problema che affliggeva le università italiane o la cultura più in generale e i loro attori. Si pensi, ad esempio, al pedagogista Luigi Volpicelli secondo il quale, più che un presunto dissidio tra cultura universitaria e cultura extra-universitaria, gli studenti italiani, i primi protagonisti della vita universitaria, soffrirono soprattutto «il dissidio fra cultura e vita, fra cultura e pseudocultura, fra una concezione vitale della cultura e una concezione utilitaria della medesima»⁸⁶.

Non mancarono neppure coloro che tentarono di suggerire soluzioni immediate e concretamente praticabili per restituire al sistema universitario la sua originaria e alta funzione formativa. Tra questi Camillo Pellizzi, allora presidente dell'Istituto nazionale di cultura fascista e già ascoltato consigliere di Benito Mussolini, ricordava, a chi lo avesse dimenticato, che gli studi universitari avessero quale compito primario quello di «preparare uomini destinati a funzioni tecnico-direttive», e pertanto a suo giudizio appariva necessario e non più procrastinabile che i «ministri, funzionari, gerarchi si sforzino e si abituino a considerare le Università (professori, assistenti, seminari, laboratori) come organi che debbono essere utilizzati da essi in modo diretto, continuo, impegnativo», rendendoli «uno strumento pieno dell'azione del Regime»⁸⁷.

Nel dibattito proposto da «Primato» meritano una particolare attenzione anche quegli interventi del tutto fuori dal coro che si collocavano su posizioni in netto contrasto con le altre e che soprattutto si ponevano in scontro con il regime stesso al quale si muovevano rilievi precisi, auspicando un diverso *modus operandi* futuro nella gestione della «questione universitaria e culturale». Si pensi ad esempio a quanto sostenuto dal giurista Pompeo Biondi, il quale cercò innanzitutto di chiarire se ci fosse stato, ed eventualmente quale fosse stato, il reale apporto del fascismo alla cultura accademica. A suo giudizio il problema universitario italiano stava proprio nel fatto che il fascismo, nonostante l'apprezzabile attivismo dichiarato, si era invece rivelato totalmente incapace di rinnovare l'Università e la cultura dal suo interno; in alcun modo ne aveva

⁸⁵ M. Lupinacci, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 5, 1° marzo 1941, p. 5. Molto duro nei confronti della posizione di Lupinacci fu Gianfranco Contini che non condivideva il giudizio negativo sul conformismo e il formalismo di cui era accusata la gioventù contemporanea (G. Contini, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 10, 15 maggio 1941, pp. 5-6).

⁸⁶ L. Volpicelli, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 6, 15 marzo 1941, p. 6. Volpicelli sarebbe stato duramente criticato da Sebastiano Timpanaro per aver troppo schematicamente diviso la cultura universitaria, «in cui prevale il metodo», da quella extra-universitaria, «in cui prevale il senso drammatico della realtà» (S. Timpanaro, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 10, 15 maggio 1941, pp. 4-5).

⁸⁷ C. Pellizzi, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 5, 1° marzo 1941, pp. 4-5.

fatto, come sarebbe invece stato auspicabile, uno strumento vivo, attivo e responsabile nella vita dello Stato. Secondo Biondi il regime mussoliniano non aveva costretto la cultura, come invece avrebbe dovuto, «a farsi azione concreta, ma ne aveva lasciato intatto lo spirito intellettualistico», che di fatto la privava di valore e le toglieva ogni concreta efficacia. In sintesi, il fascismo, che «era nato e si era posto come anti-accademico», aveva commesso il grave errore di aver conservato l'accademia per farne «un motivo decorativo della rivoluzione». Secondo Biondi, inoltre, lo stesso «rimedio di far giurare i professori», i quali avevano giurato anche «in buona fede», aveva avuto quale unico effetto quello di garantire al regime dei «buoni gregari», senza però in alcun modo riuscire ad avvicinare «l'Università e la cultura alla vita funzionale dello Stato moderno»⁸⁸.

Particolarmente critico e severo fu anche il contributo offerto all'iniziativa da Giovanni Gentile il quale pose il *focus* della propria riflessione soprattutto sul concetto di libertà, seppur intesa come libertà di ricerca e di indagine scientifica. Secondo il filosofo neo-idealista la cultura in Italia risentiva dello «sforzo faticoso che il pensiero deve fare dentro le università per raggiungere, negli insegnanti e negli studenti, quello stato di sanità, quelle condizioni normali e necessarie di vita, senza cui il pensiero di arresta, si contrae e avvolge su se medesimo, si disorienta e stenta a progredire nella sua via». In pratica Gentile asseriva che il problema dell'Università e della cultura più in generale fosse la mancanza di libertà, precisando comunque che non intendeva riferirsi alla «libertà politica», che egli giudicava «assai difficile a definire», necessaria, «ma impossibile senza la buona volontà degli individui», quanto piuttosto a «quella scientifica, didattica, della libertà della vita propria dell'Università»⁸⁹.

Degno di apprezzamento, infine, il coinvolgimento nel dibattito di alcuni tra i più importanti periodici delle sezioni locali dei GUF, portavoce del punto di vista degli studenti, indicati da molti intellettuali quali il vero centro propulsore dell'Università italiana. In particolare i redattori de «Il Bò», il giornale degli universitari fascisti di Padova, animati da «una vigorosa svolta moralizzatrice» e fervidi sostenitori della necessità impellente di un «immediato ricambio generazionale», lanciavano un animato e duro atto di accusa nei confronti del corporativismo degli insegnanti universitari, rei di aver dato vita ad una casta chiusa e rigida, troppo spesso incapace «di parlare alle masse degli studenti». Per restituire all'Università la «sua gloria» e soprattutto per rendere gli atenei italiani pronti al decisivo «balzo in avanti» che la vittoria in guerra «avrebbe assicurato», servivano invece «pochi maestri e ottimamente preparati nella scienza e nella vita» che fungessero da vera e insostituibile guida per i

⁸⁸ P. Biondi, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 7, 1° aprile 1941, pp. 3-4. Sebastiano Timpanaro fu molto critico nei confronti della posizione di Biondi, giudicandola «superfascista», estremamente pericolosa in quanto capace di «sostituire al pensiero la propaganda» (Timpanaro, *Le università e la cultura*, cit., p. 5).

⁸⁹ G. Gentile, *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 10, 15 maggio 1941, p. 4).

discenti. Solo così si sarebbe riusciti nell'obiettivo di «svecchiare, abbattere le torri eburnee e costituire organismi elastici, vivaci, convinti profondamente di ciò che siamo e dobbiamo essere nella nuova Europa», al fine di «spingere la gioventù e non a frenarla»⁹⁰.

Un lungo editoriale non firmato ma redatto con ogni probabilità da Bottai e Vecchietti riassumeva nel numero del 1° giugno 1941 il dibattito protrattosi nei sette precedenti fascicoli della rivista «Primato» sul tema tanto caro al ministro circa il rapporto tra le università e la cultura⁹¹. L'articolo finale, nel tentativo di tirare le fila tra gli innumerevoli punti di vista e le eterogenee posizioni manifestate dai diversi intellettuali coinvolti nell'iniziativa, espressione delle molteplici istanze presenti all'interno del fascismo, riusciva brillantemente nell'obiettivo di realizzare una magistrale sintesi dei contenuti offerti.

Innanzitutto si ricordava come non pochi interventi (in particolare quelli di Pasquali, Piovene, Alvaro, Pasinetti ed Argan) avessero riconosciuto all'Università il suo indiscusso ruolo di «formatrice di una cultura 'storica', di una 'norma' più generale e più valida di giudizio, di un metodo ed abito scientifico e filologico», impossibile o difficilmente realizzabile al di fuori di essa. Altresì, quale soluzione al «problema universitario», quale «problema culturale», si era manifestata quale *dòxa* comune la necessità di instaurare «un rapporto dialettico, di mutua integrazione e complementarità e compenetrazione» tra cultura universitaria ed extra-universitaria, così come «tra sapere tecnico, attività sperimentatrice e gusto, libera sensibilità».

Gli estensori dell'editoriale tenevano poi a sottolineare come le istanze e i contrasti emersi nel corso del dibattito fossero innanzitutto simbolo della notevole vivacità esistente all'interno del mondo intellettuale italiano e comunque da considerare, come ben sottolineato da Lorenzo Tronfi,

manifestazioni tutte interne ad un'«unica cultura», perché non esistevano divisioni né contrasti incolmabili, [...] nella certezza che tutta la cultura italiana «nella sua struttura ed ossatura essenziale», era di fatto «universitaria»⁹².

Semmai, rilevava «Primato», il vero problema risiedeva nel distacco avvertito sia dai commentatori «anziani» (Pelizzi, Volpicelli, Biondi e Sterpa) che dai «giovani» dei GUF («Architrave», «Roma Fascista», «Il Bò», «Rivoluzione» e «Il Campano»), fra la cultura (e quindi anche l'Università) e la vita sociale e politica del Paese. Era infatti innegabile che «una parte degli organi esecutivi

⁹⁰ «Il Bò», *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 5, 1° marzo 1941, pp. 5-6. A giudizio di Giorgio Pasquali l'intervento degli universitari di Padova, troppo trancianti e apodittici nei loro giudizi, non rispecchiava affatto le opinioni prevalenti fra i giovani universitari italiani (G. Pasquali, «Primato, lettere e arti d'Italia», vol. 2, n. 6, 15 marzo 1941, pp. 4-5).

⁹¹ [G. Bottai, G. Vecchietti], *Le università e la cultura*, «Primato, lettere e arti d'Italia», vol. 2, n. 11, 1° giugno 1941, pp. 1-2.

⁹² Tronfi, *Il «Primato» di Giuseppe Bottai: cultura e politica (1940-1943)*, cit., p. 292.

e politici del regime, mancando di «mordente in sede culturale e scientifica», aveva disconosciuto l'efficacia e la necessità della cultura «in quanto cultura» e l'aveva considerata erroneamente propaganda. In questo modo il Fascismo, «pur svalutando la vecchia cultura in quanto accademica e intellettualistica, l'ha poi lasciata sul suo piedistallo»⁹³. Opportuno, dunque, appariva ora trovare «un sano rapporto di convivenza e di collaborazione tra le due attività», evitando di pensare alla cultura «nel suo aspetto meramente tecnico, di competenza» e, nel contempo, anelando ad «una politica che non sia solo quella del giorno per giorno, propaganda». Solo così la cultura avrebbe potuto collaborare con la politica, «senza venir meno a quelle inderogabili istanze di critica e di obiettività, di verità e onestà, all'infuori delle quali è perfettamente vano ed inutile parlare di cultura». Fra Stato e cultura si sarebbe instaurata «una collaborazione politicamente libera e socialmente disciplinata», un «rapporto organico e funzionale» che avrebbe permesso alla cultura stessa, che ha nell'Università il suo principale punto di riferimento, «di essere effettivamente l'interna consapevolezza, la guida immanente, talvolta invisibile ma profonda del mondo, del costume degli uomini, e non solo l'uccello di Minerva che esce nella notte a contemplare quello che fu fatto».

Senza dubbio il dibattito avviato da Bottai sul rapporto tra le università e la cultura e sviluppatosi sulle pagine di una rivista prestigiosa e di grande risonanza quale «Primato» costituiva un ulteriore tassello di quel tentativo coraggioso ed ambizioso promosso dal ministro dell'Educazione Nazionale di rinnovare l'intero sistema universitario italiano. Sicuramente senza il precipitare degli eventi a causa della Seconda guerra mondiale, l'opera di Bottai sarebbe proseguita nel corso dei mesi e, con ogni probabilità, avrebbe raggiunto anche risultati concreti considerando soprattutto la grande capacità dimostrata dal titolare della Minerva di accendere intorno al tema gli interessi dell'intero mondo intellettuale, economico e politico italiano.

Nonostante le sempre più pressanti contingenze belliche sul finire del 1941 lo stesso ministro, in occasione dell'apertura del nuovo anno accademico, rivolgendosi ad una «massa di 127.058 studenti», ribadiva ancora con forza la necessità di affrontare quanto prima una riforma universitaria affinché la Scuola e la cultura universitaria potessero «assolvere degnamente ai propri compiti costruttivi»⁹⁴. Gli atenei e le facoltà avrebbero dovuto essere sempre più intesi come centri di comune lavoro organizzato, veri e propri organi di vita scientifica, coordinati ma sempre nel rispetto della ricerca individuale, in nome di una Scuola rigidamente selettiva «la quale [...] si specifici e si articoli in una molteplicità di ordini e istituti, corrispondenti al differenziale e gerarchico sistema delle professioni sociali». Per realizzare perfettamente

⁹³ Bottai, Vecchiotti], *Le università e la cultura*, cit., p. 2.

⁹⁴ G. Bottai, *Università anno XX*, «Primato, lettere e arti d'Italia», vol. 2, n. 23, 1° dicembre 1941, pp. 1-2. Le successive citazioni sono tratte da tale articolo.

l'opera di vera rivitalizzazione dell'Università e per far sì che questa recuperasse «l'alta funzione che le compete», era necessario tuttavia agire prima di tutto sulla cattedra universitaria, intesa come insegnamento, che si sarebbe dovuta configurare, pur «nell'esercizio della interiore libertà dei docenti», quale «la cellula vitale dell'organismo unico della Scuola Universitaria». In questo modo la «cattedra», armoniosamente inserita nel contesto più ampio della propria facoltà di appartenenza, avrebbe realizzato quell'imprescindibile «ideale e pratica intimità tra maestri e allievi» che avrebbe giovato a questi ultimi favorendone lo sviluppo intellettuale, umano e morale.

Del resto che la piena e completa formazione degli studenti fosse uno degli obiettivi primari dell'azione politica perseguita da Bottai era stato più volte ribadito dallo stesso ministro. Il giovane e brillante universitario, adeguatamente selezionato per meriti e opportunamente istruito da valenti maestri, avrebbe infatti costituito, insieme ai suoi validi colleghi, la nuova classe dirigente di una società compiutamente fascista. Proprio per questa particolare attenzione rivolta alla formazione dei giovani, Bottai godette sempre di considerazione e stima da parte del mondo universitario giovanile. Non a caso, nel corso del 1942, con l'Italia ormai sull'orlo della disfatta militare e con il fascismo in un'irreversibile crisi di consenso, quando erano molti gli studenti pronti a muovere attacchi e critiche assai feroci all'indirizzo dei gerarchi del regime, Bottai si rivelò uno dei pochi esponenti del mondo politico fascista ad essere ancora oggetto di una sincera e spontanea ammirazione da parte dei giovani universitari:

Questo possiamo affermare con tranquillità perché troppo apertamente e felicemente s'incontra, col suo spirito [di Bottai] nettamente rivoluzionario e col suo intelletto perfettamente latino, la nostra sete di apprendere, di comprendere, di credere. [...] Nulla è sfuggito al ministro dell'Educazione nazionale in un grande Paese qual è l'Italia, di quanto riguarda e definisca i giovani; tutta un'esperienza pazientemente e intelligentemente raccolta, instancabilmente e con sovrana comprensione costruita parla oggi per bocca di Giuseppe Bottai. [...] Nient'altro che uno 'studioso di giovani' si può pensarlo, quando così acutamente e categoricamente dimostra di intendere ed apprezzare il mondo spirituale giovanile⁹⁵.

⁹⁵ G. Melis Bassu, *Voce di prua*, «Intervento. Quaderno di cultura del GUF di Sassari», vol. 3, n. agosto-settembre, 1942, p. 1.

Nationalisms and schooling: between italianity and brazility, disputes in the education of italian-gaucha people (Rs, Brazil, 1930-1945)

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ABSTRACT: This study is a partial result of a research project on the history of school cultures of Italian schools in Brazil and aims to analyze the disputes experienced in schooling processes in the context of Rio Grande do Sul, Brazil, between the 1930s and 1940s of the twentieth century. On the one hand, the Italian fascist project which, using schools, newspapers, associations and other spaces of sociability of immigrants and descendants, sought, through the action of the consular network, to spread a sense of belonging to Fascist Italy. On the other hand, the public policies of the Brazilian Government, especially after 1930, were spreading and affirming the public school with Portuguese language teaching. Between the years of 1937 and 1942, numerous legislations restricted ethnic school initiatives and banned their operation in Brazil. The intention was the affirmation of a nationalist process of Brazility constitution. Ambiguities, negotiations, approximations and distancing between Gaucho and Italian authorities in this context and the process of schooling, considering that the processes of identity affirmation is relevant to understand the History of Education. The theoretical support is obtained in the Cultural History and History of Education, and the empirical field of investigation is diversified, considering for this thematic newspapers, photographs, legislation, correspondences and reports of consuls, teachers and inspectors, among others. Methodologically, documentary analysis was carried out. Understanding school processes and the constitution of identity processes between Italian immigrants and their descendants is relevant to the understanding of the plurality of school initiatives in the History of the Brazilian Education.

EET/TEE KEYWORDS: Nationalism; History of Education; Identity Process; Schooling; Fascism; Brazil; XXth Century.

Introduction

This text is a partial result of a research project on the history of school cultures in Italian schools in Brazil¹ and aims to analyze the disputes experienced in schooling processes in the context of Rio Grande do Sul, Brazil between the 1930s and 1940s of the twentieth century. The ambivalence of nationalization projects put on the scene in the historical period investigated pointed out two conditions – on the one hand Brazility, in which the Brazilian government, with Vargas in power, pressed for immigrants and descendants to learn Portuguese and to recognize themselves as Brazilians, on the other hand Italianity, in the Italian Fascist government of Mussolini appealed to the ‘Italians abroad’ the identification as such. The strategies of the two governments and their different bodies are analyzed, especially considering the educational issues in the context of Rio Grande do Sul.

Rio Grande do Sul is a state of late colonization, which historically constituted itself as a frontier, peripheral, marked by wars with large contingents of immigrants in its territorial occupation, among them Portuguese, Azorean, German, Italian, Polish and many others². As one of the Brazilian states that most received immigrants, in the case of the Italians, the majority immigrated between the end of the eight hundred and the first decade of the nine hundred and occupied colonies and urban areas like the Capital. These immigrants built schools linked to their ethnic belonging, that is, Italian schools. Many of these schools were subsidized by the Italian Government through a consular network that provided school supplies (books, especially) and eventually financial contributions. These school spaces ensured a schooling process aimed at spreading the feeling of Italianity. This feeling, after the fascist reforms, was accentuated in the 1930s. On the other hand, the public policies of the Brazilian Government, especially after 1930, were spreading and affirming the public school with the teaching of Portuguese. Between the years of 1937 and 1942, numerous legislations restricted ethnic school initiatives and banned their operation. The intention was the affirmation of a nationalist process of Brazility constitution.

Understanding the ambiguities, the processes of negotiation, approximation and distancing experienced between Brazilian/Gaúcho and Italian authorities in this context and the schooling process, thinking about the affirmation of identity processes is relevant to understand the History of Education.

The theoretical support of the analysis is obtained in the Cultural History and History of Education, having the diversified empirical field of investigation,

¹ Research project funded by the National Council of Scientific and Technological Development (CNPq) and linked to the Research Group on History of Education, Immigration and Memory (GRUPHEIM).

² S. J. Pesavento, *História do Rio Grande do Sul*, Porto Alegre, Mercado Aberto, 1980.

considering for this newspapers, photographs, legislation, correspondences and reports of consuls, teachers and inspectors, among others. Methodologically, we proceeded with the documentary analysis. Understanding school processes and the constitution of identity processes between Italian immigrants and their descendants is relevant to the understanding of the plurality of school initiatives in the History of the Brazilian Education.

1. «Italians abroad» and foreign policy under the fascist regime

From 1870, the foreign policy of the newly unified Italy began to rely upon the administrative competence of Italian schools abroad. The consular organization was then responsible for the organization, promotion, inspection and systematization of schools. The diffusion of Italian culture and language was the focus and, according to Floriani³, was articulated from (a) fixed or extraordinary subsidies for private initiatives; (b) maintenance of government schools with distinct natures and degrees; (c) subsidies to institutes teaching Italian, even if they were not Italian⁴.

The Royal Decree 6566 of 1889 of Francesco Crispi, then Prime Minister and Minister of Foreign Affairs, approved the ordering of Royal Italian Schools (common around the Mediterranean) and Italian schools abroad. This normalization established the direct and immediate management of school institutions as a burden of the Italian Government, affirming the laity of education, the subsidy of elementary schools maintained by associations and individuals, and provided for the possibility of the opening of subsidized High Schools. It was a period when the budget for school subsidies was expanded. There was the perspective of regulating and establishing the educational program, the textbooks that would be used and inspections to verify the functioning of such schools. The modernization of the diplomatic policy of Italy under the leadership of Crispi sought approximation with immigrants. By Law 5866 of December 30, 1888, it was established that Italy could not lose sight of immigrants, but accompany them in the «new homeland», protecting them⁵.

In the same direction, the Dante Alighieri Association was created by Giacomo Veneziam in 1889. This association would be «widely used by the Italian government in the diffusion of language, culture and 'Italianness' throughout

³ G. Floriani, *Scuole italiane all'estero: cento anni di storia*, Roma, Armando Editore, 1974.

⁴ *Ibid.*, p. 8.

⁵ A. De Clementi, *La "grande emigrazione": dalle origini alla chiusura degli sbocchi americani*, in P. Bevilacqua, A. De Clementi, E. Franzina, *Storia dell'emigrazione italiana. Partenze*, Roma, Donzelli Editore, 2001, pp. 187-209.

the world»⁶. In this period, the creation of Italian schools abroad gained momentum, many receiving subsidies for its operation. Crispi «stimulated the feeling of Italianity, favoring the creation of schools, hospitals, newspapers, charity associations»⁷.

In later years, the oscillation of Italian foreign policy towards emigrants produced periods of approximation, with the creation of schools, but also of distance and, consequently, abandonment and interruption of subsidies. The economic decline was one of the biggest in the entire Italian foreign policy. There were attempts to maintain the school subsidy and the sending of books, but instability and discontinuity were remarkable.

According to Floriani⁸, law 867 was approved in December 1910, which can be considered a complete and organic legislation for Italian schools abroad. But the law-derived action was effective only from the 1920s, with the end of the First World War. The Ministry of Foreign Affairs, through its internal body, developed a project to reorganize policies for the promotion and defense of Italianity in Italian foreign schools present in America and, more specifically, in Brazil. As Barausse⁹ pointed out, in the years between the crisis of liberal institutions and the rise of fascism, within Italian diplomacy, and particularly in relation to the General Directorate of Italians and Schools Abroad led by Ciro Trabalza, the reorganization project of actions planned for Brazil occurred. With these aims, there was a great concern to reorganize Italian schools and for this purpose agents were sent to inspect, to report and to suggest actions to reorganize these schools as strategy of Italianity diffusion. Alemanni, for example, suggested that Italian schools maintained in Brazil should also teach Portuguese¹⁰.

The Royal Decree No. 933 of April 1923, signed by Mussolini (also Minister of Foreign Affairs), abolished the Central Council of Schools Abroad, established that teachers of Italian schools abroad should pronounce a solemn professional vote in which they promised to educate students to love the Fatherland and to have greater devotion to the King and their institutions. Therefore, according

⁶ A. Cervo, *As relações entre o Brasil e a Itália: formação da italianidade brasileira*, Brasília, UNB, 1992, p. 3.

⁷ *Ibid.*, p. 12.

⁸ Floriani, *Scuole italiane all'estero: cento anni di storia*, cit.

⁹ Alemanni Report 1923, in Archivio Storico Diplomatico del Ministero degli Affari Esteri (henceforward ASDMAE), Archivio Scuole 1923-1928 (henceforward AS 1923-1928), busta (henceforward b.) 702, fascicolo 9 henceforward f.) *Studi per riforme ordinamento scuole italiane nel Levante e in America*, in A. Barausse, *School books as instruments for the promotion of Italian national identity in Brazil during the first years of fascism (1922-1925)*, «Historia da Educação», vol. 20, n. 49, 2016, pp. 81-94, 85.

¹⁰ A. Barausse, *The construction of national identity in textbooks for Italian schools abroad: the case of Brazil between the two World War*, «History of Education & Children's Literature», vol. X, n. 2, 2015, pp. 425-461.

to Medici¹¹, it promised to propagate Italianity, promoting within the colonies the ideal that they constituted a single fascia that sought the Italian economic prosperity and its prestige in the world. In legislation dated 1924, new programs and the guidelines for Italian schools abroad were established. Through the diffusion of Italian language and culture, of national sentiment, in the most diverse colonies scattered throughout the world, the «great fascist achievements», it was believed that narrowing relations, influences, and thus gains for The Motherland Italy with 'Italians abroad'¹² and the receiving countries.

Since the earliest years, Fascism sought in associations, newspapers and schools maintained by Italians or descendants abroad, support, diffusion and conquest of adepts. As Bertonha recalled, «[...] the Fascist government began to conquer the Italian school system abroad as early as 1923/1924, when various laws centered schools and accentuated their role of educating Italians abroad»¹³. A profound change in Italian foreign policy was observed with the advent of fascism. The consular network was expanded and a more active presence in the protection of immigrants was observed.

The program of fascistization of Italians abroad and the involvement of school institutions for this purpose became more pronounced at the end of the 1920s, and coincides with changes in ministerial structure reported with the figure of Piero Parini¹⁴, with significant reorganization, with another denomination, the General Direction of Italians and Schools Abroad¹⁵. In addition, they sought to guarantee fascistization by encouraging the institutionalization of *fasci all'estero*¹⁶ of *Dopolavoro*¹⁷, as well as the promotion of large demonstrations such as parades, greetings, intonation of war songs such as *Giovinezza*, dances, football games, inauguration of monuments and a whole set of fascist rituals celebrated

¹¹ L. Medici, *Dalla propaganda alla cooperazione: la diplomazia culturale italiana nel secondo dopoguerra (1944-1950)*, Padova, CEDAM, 2009.

¹² The emigrant nomination was replaced by «Italians abroad», which was then used by diplomatic bodies referring to all emigrants and descendants.

¹³ J.F. Bertonha, *O fascismo e os imigrantes italianos no Brasil*, Porto Alegre, EDIPUCRS, 2001, pp. 48-49.

¹⁴ Piero Parini visited Rio Grande do Sul on December 1931.

¹⁵ Barausse, *The construction of national identity in textbooks for Italian schools abroad: the case of Brazil between the two World War*, cit.; M. Pretelli, *Il fascismo e gli italiani all'estero*, Bologna, Clueb, 2010.

¹⁶ *Fasci all'estero* – groups that organized propaganda and diffusion of the fascist ideology in the Italian communities abroad, trying to co-opt them. They also developed assistance, cultural activities, ceremonies to defend Italianity and fascism. On activities in Brazil, see E. Franzina, M. Sanfilippo, *Il fascismo e gli emigrati: la parabola dei fasci italiani all'estero*, Roma-Bari, Laterza, 2003.

¹⁷ The *Dopolavoro all'estero* were associations aimed at workers who abroad have become «a very effective means of approaching, through recreation, sport and culture, Italians from abroad to fascism» J.F. Bertonha, *Fascism and Italian immigrants In Brazil*, Porto Alegre, EDIPUCRS, 2001, p. 46.

in different spaces of socialization, as will be explained later. However, it should be noted that «[...] only a small minority of emigrants were converted into militants of the *fasci all'estero* and that of these, the majority were made up of members of the bourgeoisie and local Italian middle classes»¹⁸.

Propaganda towards and in favor of fascism was also present in celebrations and rituals. The celebrations of the fiftieth anniversary of the Italian colonization in 1925 constituted a moment of exaltation of the contributions of Italians in the formation of the state of Rio Grande do Sul, as well as the consolidation of diverse representations. The representation of the Italian power that expands, grows and economically advances under the leadership of Mussolini gains space among the «Italians abroad», who identify themselves by the positivity that such condition provides to them, especially among those that began to stand out financially in the state, that is, the colonial and capital elites, as reported by Giron¹⁹. Bertonha also corroborates in the same direction, realizing that the identification with the being «Italian» became to have meaning with the fascist being. In his words,

The originality of the regime was the identification of Italianity with fascism, which led to the supplementation of the traditional policy of greater relationships and protection of emigrants (already defended by nationalists) with an association of the Italian homeland with the fascist regime²⁰.

A significant place was exercised by consular authorities. The action of consuls as local leaders in the promotion and diffusion of fascism is perceptible at various moments. In the present research condition; however, it is not possible to distinguish the differentiated contribution of consular authorities in relation to urban and rural areas. A recent survey on Italian schools in the context of Porto Alegre²¹ drew attention to the active role of consular authorities²² and the Italian *fascio* abroad called «Carlo Prete» in the diffusion of fascism in schools.

¹⁸ Bertonha, *O fascismo e os imigrantes italianos no Brasil*, cit., p. 43.

¹⁹ L.S. Giron, *As sombras do Littorio: o fascismo no Rio Grande do Sul*, Porto Alegre, ed. Parlanda, 1994.

²⁰ Bertonha, *O fascismo e os imigrantes italianos no Brasil*, cit., p. 29.

²¹ G.L. Rech, *Escolas étnicas em Porto Alegre/RS (1877-1938): a formação de uma rede escolar e o fascismo*, 2015, 449 fl Thesis (Doctorate in Education). Graduate Program in Education, Federal University of Pelotas, 2015. The impression, however, is to find ourselves with processes of analysis that still need to be interpreted and contextualized. A careful and thorough look at the documentation to consider the individual involvement of each of the consuls in the period is still necessary.

²² During the years of Fascism, the following consuls took over in Rio Grande do Sul: Luigi Arduini (1924-1925), Manfredo Chiostrri (1928-1932), Mario Carli (1932-1934), Américo Gigli (like vice-consul regent between 1934 and 1935), Guglielmo Barbarisi (1934-1937) and Santovincenzo Magno (1937-1945). On a first look at this issue, see Bertonha, *O fascismo e os imigrantes italianos no Brasil*, cit., and above Università di Lecce, *La formazione della diplomazia nazionale (1861-1915): repertorio bio bibliográfico dei funzionari del Ministero degli Affari Esteri*, Roma, Istituto Poligrafico e Zecca dello Stato, 1987, *ad vocem*.

In this context, the process of transformation of Italian schools in Rio Grande do Sul also takes place. The situation of Italian schools in Rio Grande do Sul in the early twenties of the twentieth century, as pointed out by Luchese²³ was precarious and the majority of immigrants and their descendants attended public or confessional schools. The small growth observed in the values presented in the yearbooks published by the General Direction of the Ministry of Foreign Relations was for years 1921-1925, for a new decline at the end of the same decade, according to the table below:

Table 1. – *Italian Schools in Brazil – 1890 to 1930*

| Federative unit | Periods | | | | | | | | | |
|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------|-------|
| | 1890-1891 | 1896-1897 | 1904-1905 | 1909-1910 | 1913-1914 | 1921-1922 | 1922-1923 | 1924-1925 | 1927 | 1930 |
| Bahia | 20 | - | - | 250 | - | - | - | - | - | - |
| Minas Gerais | - | - | - | 296 | 330 | 307 | 333 | 301 | 267 | 321 |
| Paraná | - | - | 752 | 596 | 786 | 704 | 1644 | 708 | 568 | 708 |
| Santa Catarina | - | - | 1681 | 1132 | 2261 | 1477 | 3195 | 2915 | 1032 | 2010 |
| Pará | - | - | - | - | - | 30 | 30 | 30 | - | - |
| Pernambuco | - | - | - | 424 | 424 | 656 | 656 | 656 | 409 | 61 |
| Rio Grande do Sul | 1468 | 2250 | 3213 | 2492 | 4310 | 3199 | 4628 | 4085 | 3315 | 3686 |
| Rio de Janeiro | 50 | 95 | 214 | 411 | 438 | 774 | 1072 | 901 | 334 | 101 |
| São Paulo | 515 | 1200 | 7275 | 6724 | 13307 | 5642 | 8248 | 10626 | 7012 | 6934 |
| Espírito Santo | - | - | 138 | 1053 | 1355 | - | - | - | 785 | 0 |
| Mato Grosso | - | - | - | 180 | 201 | - | - | - | 180 | 0 |
| TOTAL | 2053 | 3545 | 13273 | 13558 | 23412 | 12789 | 19806 | 20222 | 13902 | 13821 |

Source: Re-elaboration of the authors from «Annuario delle scuole italiane all'estero», series 1889-1930.

Statistical data, however, should be analyzed with caution²⁴. In fact, a more in-depth analysis of the documentation filed and preserved with the Ministry

²³ T.A. Luchese, *Abrasilizar os coloninhos: histórias e memórias escolares na região colonial italiana do Rio Grande do Sul (1937-1945)*, in C. Quadros (org.), *Uma gota amarga: itinerários da nacionalização do ensino no Brasil*, Santa Maria, RS, EdUFSM, 2014, pp. 191-231; Ead., *O processo escolar entre imigrantes no Rio Grande do Sul*, Caxias do Sul, Caxias do Sul, EDUCS, 2015.

²⁴ In the early XX Century, Giuseppe Lombardo Radice argued against the trust of statistical data furnished by minister of Foreign Affairs. See G. Lombardo Radice, *Le scuole italiane all'estero. Note sulla indecorosa politica della Consulta da Rudini a Tittoni*, Ortona a mare, V. Bonanni, 1910.

of External Relations testifies to the attention paid by consular authorities to the school problem, the non-linearity of policies and the low reliability of various official data. Some recent studies have shown the importance of the Ministry, since 1921, in promoting the development of Italian schools with the cooperation of Catholic organizations and, in particular, *Italica Gens* through the work of inspectors, who are in favor of resuming, at least in part, the diffusion of Italianity through schools²⁵. On the other hand, there were few ethnic schools that persisted effectively. It is noteworthy that there were about three thousand students in the records produced by consuls on Italian ethnic schools in Rio Grande do Sul, including those who attended confessional and lay schools. These data should be analyzed with caution and one has to question which school is all about. The evidence indicates that even isolated schools were considered as public, because they were subsidized by the government of Rio Grande do Sul and, on the other hand, as Italian because they were also subsidized by the Italian government. This is a situation that merits further consideration. For example, Professor Firmino Bonett is on the list of Italian schools and also as a state-subsidized school. It is noteworthy that later the same professor was inspector of public schools in Caxias do Sul. The data presented in the list of the Italian Consul of Porto Alegre, Luigi Arduini, show a decrease in the total number of enrollees, which from the total of 3094 enrolled in 1921, became 2767 in the following year. In Porto Alegre, the two elementary schools in operation – Umberto I and Principessa Elena de Montenegro, established since the early nineties – did not have more than 86 students²⁶.

The situation of schools has not ceased to be observed by consular authorities. In the reserved communications transmitted by Consul Arduini to the General Direction of Italian Schools of the Ministry of Foreign Affairs, Consul Arduini talked about the true and proper «debacle» [collapse] of the «disastrous situation» of Italian schools. In particular, the Italian consul in Porto Alegre denounced «under current conditions, Italian schools continue to flourish», but marked the state of «abandonment», of «carelessness» in which all the small lay schools maintained by the Italian government with subsidies and present in the regions of the colonial area as «small bastions of Italianity!» At the same time, he reiterated the scarce «efficacy, usefulness and training» offered by education, especially by the actions promoted by religious institutes in which «prevailing those of French origin and mentality» hindered the promotion of the national language. The consul's relationship, which was intended to cause alarming reactions within the Ministry²⁷, reflected the loss of national sentiment among

²⁵ A. Barausse, *I libri scolastici come strumenti di promozione dell'identità nazionale italiana in Brasile nei primi anni del fascismo (1922-1925)*, «Historia da Educação», vol. 20, n. 49, 2016, pp. 81-94.

²⁶ Luigi Arduini report, September 1925, in ASDMAE, AS, 1923-28, b. 637, f. *Porto Alegre*.

²⁷ The consul, referring to the negative situation of schools, referred to the fruits of the «absence of Government» producing a certain irritation inside the General Direction. The issues

Italian immigrants, especially those living in urban areas, since those living with certain conditions of isolation presented some resistance to the process of becoming Brazilian.

The process of denationalization is naturally much easier in cities than in rural areas, but it is a fact that even in these locations, with the opening of roads and new communication pathways, with the intensification of trade between colonies and more inhabited centers and, above all, by the works being developed by local authorities, which do not actually welcome foreign schools, no matter how modest, try to supplant them²⁸.

Arduini saw no room to ensure a «breakthrough» but rather the necessary demand for a true and proper «reform work» through a series of measures, among them the expansion of financial investment, the support of schools run by lay teachers in colonial areas, the establishment of religious confessions of Italian origin and the wider dissemination and circulation of school materials and textbooks²⁹.

In the context of Rio Grande do Sul, precisely when fascist policies for ‘overseas Italians’ become more organized and active, with the presence of consuls committed to the cause, the processes of nationalization for the constitution of the ‘Brazilian being’ are evidenced in legislation and also in practices. Italianity and Brazility, negotiated, but also conflicting and ambiguous, will circulate in Rio Grande do Sul.

2. *The nationalism of Getúlio Vargas and the nationalization campaign in Rio Grande do Sul*

Several studies, such as those of Gertz³⁰, affirm that the formation of the Brazilian nation has been a topic of discussion since 1830 without, however, reverting to more effective actions³¹. Intellectuals and political representatives debated, in different moments and directions, the alternatives for the formation

identified by Trabalza, which needed to be rectified, were reorganized although it was analyzed and reported by Itálica Gens consular officer Cesare Bompard, who had sent to the Ministry a report that contained a less pessimistic assessment of the situation of Italian schools abroad. See the note of Ciro Trabalza on December 3, 1925, in ASDMAE, *Arquivo Scuole 1923-1928*, b. 637, f. *Porto Alegre*.

²⁸ Luigi Arduini report, September 1925, cit.

²⁹ *Ibid.*

³⁰ R.E. Gertz, *O aviador e o carroceiro: política, etnia e religião no Rio Grande do Sul dos anos 1920*, Porto Alegre, PUCRS, 2002; Id., *O Estado Novo no Rio Grande do Sul*, Passo Fundo, UPF, 2005; Id., *Etnias e nacionalização no Sul do Brasil*, in Quadros (org.), *Uma gota amarga: itinerários da nacionalização do ensino no Brasil*, cit, pp. 13-41.

³¹ One of the actions mentioned is the creation of the Brazilian Historical and Geographical Institute founded in 1838.

of the Brazilian nation, but the practices of nationalization only took place in the late thirties of the twentieth century. In the context of World War I (1914-1918), the first nationalization campaign was carried out, but with restricted measures regarding the federal government and ineffective regarding Rio Grande do Sul.

Between 1930 and 1937, Flores da Cunha³², named by Getúlio Vargas, was the head of the administration in Rio Grande do Sul. The issue of nationalization, even if present in the press, debated among intellectuals and local leaders, was not a cause for restrictive and / or punitive legislation in those years. Flores da Cunha's negotiating movements and relations with immigrants and descendants, especially Italians and Germans, were cordial. As an example, in 1932, the arrival of the ambassador of Italy Victorio Cerutti to Rio Grande do Sul, was widely announced in newspapers and it was said that he was «the object of tributes on the part of the State Government, among which a banquet»³³. On February 23, 1932, the cover story of the «Jornal a Federação» was «The RS will host for 20 days, the Italian Ambassador in Brazil»³⁴. The program included a visit to Italian schools of the state Capital, to Italian companies, to major industrial and commercial enterprises, and he would receive at the consulate's headquarters Fascio Carlo Del Prete, the association of retired combatants and officers. It was scheduled for February 24, 1932 a reception in the *Casa dos Italianos* [Italica Domus] in which commemorative books to the 10th Fascist Year were distributed. On February 27, Ambassador Cerutti went on a special trip to Caxias to visit the Grape Festival, accompanied by intervener Flores da Cunha and countless other authorities. Cerutti had been ambassador since May 1931, and as reported in the newspaper, «with skill enough has been able to tighten more and more the ties that unite us to the children of Mussolini's country»³⁵. In March of the year of 1932, the commemoration of the anniversary of the Fascio gathered in Italica Domus, in addition to the Italian Consul, numerous state and municipal authorities of the capital of Rio Grande do Sul, including mayor Alberto Bins³⁶. In October of the same year, the celebration of the 10th Anniversary of the March on Rome with mass celebrated in the memory of the

³² «On November 28, 1930, immediately after revolution, Getúlio Vargas appointed José Antônio Flores da Cunha as the intervener of Rio Grande do Sul [...]. Flores da Cunha would govern Rio Grande as intervener until April 1935. He was then indirectly elected governor by the Southern Constituent Assembly until October 17, 1937. He then resigned and took refuge in Uruguay because of his failed opposition to Vargas and the New State coup [...]. Flores da Cunha was born in Santana do Livramento in 1880. He was the third of thirteen children of a traditional Republican stallholder in the region. He was a young man from the PRR party and graduated from the Rio de Janeiro Law School in 1902, working in the federal capital as a police officer». M. Maestri, *Breve História do Rio Grande do Sul da pré-história aos dias atuais*, Passo Fundo, EdUPF, 2010, p. 321. Flores da Cunha occupied different positions having been intendant of Uruguiana, state deputy, deputy chief of police, governor and senator by Rio Grande do Sul.

³³ «Jornal a Federação». vol. XLIX, n. 40, February 19, 1932, p. 3.

³⁴ «Jornal a Federação», vol. XLIX, n. 44, February 23, 1932, p. 1.

³⁵ «Jornal a Federação», vol. XLIX, n. 44, February 23, 1932, p. 1.

³⁶ «Jornal a Federação», vol. XLIX, n. 70, March 26, 1932, p. 2.

«martyrs of the fascist revolution who fell in the great struggle», a solemnity marked by the speech of authorities, especially Consul Mário Carli, followed by typical dances³⁷.

According to Chartier³⁸, the celebration allows perceiving cleavages, tensions and representations that go beyond the society, so Ambassador Cerutti's diplomatic mission and the celebrations of 1932 can be illustrative of the processes of identity negotiation and proximity in the political-economic interests among local leaders and Italian authorities. But there are other celebrations in this period that deserve attention. The commemoration of the centenary of the *Farroupilha* Revolution in 1935 led to innumerable movements based on the construction of a memory about that event. Italians and descendants were called again to share the fact with the composition of a committee responsible for organizing the celebrations in order to spread reciprocity representations around the same heroes, like Giuseppe Garibaldi.

An illustrative case of how Giuseppe Garibaldi, the «hero of two worlds» was being revisited in celebrations is the re-inauguration of the statue of Anita and Giuseppe Garibaldi. The year 1935, in addition to the *Farroupilha* Centenary celebrations, also celebrated the 50th anniversary of the death of Giuseppe Garibaldi. Under the title «The tributes of Rio Grande do Sul to the walking knight of freedom», the «Jornal a Federação» in June 1932 published in full page that «the festivities were a reaffirmation of the bonds of friendship that link Italy to RS»³⁹. The newspaper stated that the commemorative date is out of national and state holiday. The city of Porto Alegre had dawned with festive aspect with «facades of public and private establishments [in which] national, Rio Grande du Sul and Italian flags were seen». The first ceremony was held at the statue of Anita and Giuseppe Garibaldi and was attended by the Italian Consul Mario Carli, Flores da Cunha, Interior, Public Works and Finance Secretaries, and mayor of Porto Alegre, Alberto Bins, in addition to representatives of the Mutual Aid society, and, in particular, the presence of the teachers and students of Italian schools. Figure 1 shows the presence of children in the festivity:



Pic. 1. Solemnity in honor of the fiftieth anniversary of Giuseppe Garibaldi's death at Garibaldi Square, Porto Alegre (1935). Source: «Jornal a Federação», march 6, 1932, p. 10.

³⁷ «Jornal a Federação», vol. XLIX, n. 247, October 27, 1932, p. 4.

³⁸ R. Chartier, *Leituras e leitores na França do Antigo Regime*, São Paulo, ed. UNESP, 2004.

³⁹ «Jornal a Federação», vol. XLIX, n. 146, June 3, 1932, p. 10.

The solemn act, full of greetings and cheers for Italy and Brazil, had the discourse of several authorities, drawing attention to the statement of intervener Flores da Cunha, who would have claimed to admire «the laborious Italian colony for its work for the greatness of the State»⁴⁰. The solemnity had been finalized with the execution of the Brazilian, Italian, Rio-Grande do Sul and fascist hymns by the Municipal Band. In continuity, celebrations continued in the São Pedro Theater and a special session dedicated to the theme was held by the Historical and Geographical Institute of Rio Grande do Sul. The celebration of the 50th anniversary of Garibaldi's death was also remembered in a ceremony held at Itamaraty.

It is noteworthy that in November 1936, the «Jornal a Federação» reported the homage to the «Italian heroes of 1935», stating that:

Organized by the *Pro Centenário Farroupilha* Italian Committee, the civic ceremony will be held on Sunday, 22nd in commemoration of the Italian heroes who fought for the Farroupilha Republic. The Italian colony will meet as we reported at 8 am in the Itálica Domus, in which reception room will open the portraits of the most important figures of Rio Grande such as Garibaldi and Anita, Zambeccari, Anzani, Castellini, ecc. After that, the procession of cars and buses will be organized to transport Viamão as many as possible to attend the second part of the ceremony, with the discovery, on the facade of the Municipal House, of the tombstone in honor of the memory of Luiz Rossetti, journalist, warrior and ministerial secretary of the Republic, killed in the *Passo do Vigário* battle on November 23, 1840⁴¹.

A few days later, the same newspaper again gave space to announce that the Italian Colonial Committee had offered 120 contos de reis (Brazilian currency of that time), all furniture and utensils for the Forlanini Pavilion of the Belém Sanatorium. In addition, the newspaper affirmed that the Consul of Italy, Barbarisi and the Dante Alighieri President, Attilio Marsiaj, had appeared in the Palace of the Governor Flores da Cunha to invite him to the solemnity in honor of the Italian heroes. All the Italian associations in Rio Grande do Sul had also been invited and the meaning, as reported, was «a lasting homage of gratitude from the Italian Colony to hospitable Rio Grande»⁴². The same portraits of the 'Italian heroes' had been displayed in the *Praça da Alfândega* for a few months in 1935⁴³.

The way in which these festive events are portrayed in the pages of newspapers signals to processes of identity negotiation, for relations of power that are supported and perceived as integrated. The exaltation of the laboriousness of Italian immigrants and their descendants by local authorities and also the fascist discourse, forged representations about the effectiveness, patience and progress that Italians built on Gaucho soil. But in the fascist appeal, all descendants

⁴⁰ «Jornal a Federação», vol. XLIX, n. 146, June 3, 1932, p. 10.

⁴¹ «Jornal a Federação», vol. LIII, n. 261, November 17, 1936, p. 5.

⁴² «Jornal a Federação», vol. LIII, n. 265, November 21, 1936, p. 1.

⁴³ «Jornal a Federação», vol. LII, n. 92, September 25, 1935, p. 3.

continued being part of the 'great' Italy, an Italy outside the Italian territory. Gradually, these relations of proximity and negotiation, often ambiguous and polarized, were shaken by national and international events, aggravated by the Second World War and the participation in Brazil.

With the *Estado Novo* coup of 1937 by Getúlio Vargas, Flores da Cunha was deposed and General Manoel de Cerqueira Daltro Filho was nominated, who administered between October 17, 1937 and January 19, 1938, when he passed away. General Osvaldo Cordeiro de Farias⁴⁴ assumed and remained until September of 1943 when he left the position to integrate the Brazilian Expeditionary Force sent to fight the Axis in Europe⁴⁵. Cordeiro de Farias was replaced by Ernesto Dornelles until the end of the *Estado Novo*.

The five years in which Cordeiro de Farias was at the head of the government of Rio Grande do Sul were crucial and decisive for the nationalization campaign⁴⁶. Practices of Brazility construction were disseminated and implemented by Cordeiro de Farias, including with regard to education. For Quadros, the Brazilian state intervention, from 1937, on the education nationalization involved four dimensions, namely:

1. an extensive and detailed jurisprudence on education; 2) the technical and administrative restructuring of Sesp/RS; 3) the development of policies to expand the state education network, with the construction of schools, the hiring of teachers and staff, the increase in the number of students enrolled; and 4) careful guidance, supervision and inspection of school work⁴⁷.

⁴⁴ «Osvaldo Cordeiro de Farias was born in Jaguarão in 1901. He studied at the Military School of Rio de Janeiro and participated in the tenentist conspiracies of 1922, and the 1924 uprising in Uruguaiana, prominently integrating the Prestes Column. Exiled in Bolivia in 1927, returned to Brazil the following year, where he was arrested, tried and acquitted. He returned to the army and anti-government conspiracies. He participated in the 1930 uprising, leading from 1931 to June 1932 the São Paulo Police. He collaborated in the repression of the Constitutionalist movement in 1932, and in 1935 he fought in Rio de Janeiro the uprising of the Liberating National Alliance and many of his former companions of the Column and the tenentist notes. In 1937, in Porto Alegre, he assumed the position of Chief of Staff of the 3rd Military Region, participating in the deposition of Flores da Cunha. After the death of Daltro Filho, he was appointed interventor, leaving the post in September 1943 to join the Brazilian Expeditionary Force, sent to combat the Axis in Europe». Maestri, *Breve História do Rio Grande do Sul da pré-história aos dias atuais*, cit., pp. 335-336.

⁴⁵ *Ibid.*

⁴⁶ On the nationalization campaign in Caxias do Sul, see the study of M.F. Pagani, *O nacionalismo*, Caxias do Sul, Maneco, 2005; On Guaporé, the research of C.M. Sganzerla, *A lei do silêncio: repressão e nacionalização no Estado Novo em Guaporé*, Passo Fundo, UPF, 2001. In relation to the *Estado Novo* in the Fourth Colony see C. Dalmolin, *Mordaça verde amarela: imigrantes e descendentes no Estado Novo*, Santa Maria, Pallotti, 2005; A. de Medeiros Rios, *Ser ou não ser italiano: descendentes de imigrantes em Santa Maria durante o Estado Novo*, 2001. 156f. Dissertation (Master in History) – Graduate Program in History, Pontifical Catholic University of Rio Grande do Sul, Porto Alegre, 2001.

⁴⁷ C. Quadros, *O discurso que produz a reforma: nacionalização do ensino, aparelhamento do Estado e reforma educacional no Rio Grande do Sul (1937-1945)*, in Quadros (org.), *Uma gota amarga*, cit., p. 120.

The nationalization of education resulted in a broad educational reform, in which the government assumed schools in the context of the state of Rio Grande do Sul, with emphasis on the Technical Section of the General Direction of Public Instructions and the Center for Research and Educational Guidance (CPOE / RS). The «O Momento» newspaper, in Caxias, in October 1938, emphasized that Rio Grande do Sul had received «a remittance of funds for the nationalization of the education campaign» sent by Getúlio Vargas' government, to which the intervener would be grateful for «such patriotic assistance»⁴⁸. The following year, with the title of «The Revolution Continues», the same newspaper emphasized that «the spread of schools through our territory and the nationalization of education are the greatest achievements of that military movement that began on October 3, 1930». In addition, it also defined that «the Brazilian pedagogical revolution, formed in a new spirit, concludes the sense of the revolution of 1930»⁴⁹. In this way, it is noticeable that in a few years the campaign of nationalization and constitution of a sense of belonging to Brazil were given by decree, just as those who had not learned Portuguese were silenced.

3. Between italianity and brazility, the Italian-gaucho community and its educational process

Between 1930 and 1937, Flores da Cunha adopted several measures aimed at the administrative organization of schooling in Rio Grande do Sul. In 1935, he created the Secretary of State for Education and Public Health (Sesp), regulated the teaching career, and adopted new criteria for dismissal and removal of teachers. Also, he extended the network of schools and their physical structures, as well as the attendance of students and the nomination of teachers. According to Bastos and Tambara «[...] in 1930, there were 718 teachers, with 2,131 municipal schools and 1,320 private schools, in 1937, the number of school units increased to 5,346, of these 902 were state schools, 2,807 municipal schools and 1,637 private schools»⁵⁰.

The presence of a larger number of public schools, subsidy policies, and restrictions that were imposed with the Estado Novo regimen on ethnic schools led to their progressive extinction, even before the closing decree of 1942. However, it is necessary to add to this scenario of state public policies that the freedom of education, fervently defended by the local positivists, allowed,

⁴⁸ «Jornal a Federação», vol. VI, n. 295, October 31, 1938, p. 4.

⁴⁹ «Jornal a Federação», vol. VII, n. 346, October 30, 1939, p. 1.

⁵⁰ M.H. Camara Bastos, E.A. Tambara, *A nacionalização do ensino e a renovação educacional no Rio Grande do Sul*, in Quadros (org.), *Uma gota amarga*, cit., pp. 86-87.

together with the absence of schools to meet the demands, the opening of ethnic schools in previous decades⁵¹.

Italian ethnic schools can be differentiated between rural initiatives, of families in a community that chose the most enlightened individual and, in a generally improvised space, they opened a class for teaching reading, writing, calculations and catechism. They were ephemeral and rudimentary schools, mostly. Countless families in the community, when they could afford it, built a building, equipped the room with furniture, and pressured municipalities to subsidize the teacher, often indicated by the families themselves⁵². In the early 1930s, Italian consular authorities recognized the declining numbers of ethnic schools in rural areas. Considering this decrease, Consul Chiostrri affirmed that this position of so many settlers was justified by the economy that the attendance of children in public schools represented, or even because

Other schools closed when they came to be absence (by death), the incitement and encouragement of our priests, others disappeared by the death of their teachers who were not replaced, others were supplanted in the same house, consenting the settlers to the opening of Brazilian schools with teachers paid by the government⁵³.

Few were schools that continued to survive and the consul pointed to schools with the names of Boco, Frago, Angelina Viero de Farquinha – «in which teaching is still with a little Italian» and parochial schools of Nova Roma «that really presented results». In most cases, however, the education given was considered limited:

Schools, which in addition to the elementary education of our language, teach other notions such as History, Geography and above all prepare the hearts and minds of our children to love the homeland, there are not many other than Nova Roma, Ana Rech and the two of the capital supported by Society Umberto I and Princess Elena of Montenegro and the Medium Institute of Professor Menegatti, which despite the great difficulties, continues to prepare for the professional life our young people, who leave school with a strong feeling of homeland⁵⁴.

The old ethnic-community schools that had been opened in the colonization process were all closed, and the presence of confessional schools was consolidated, on which much discussion was still being made, as well as the expansion of the commitment of the State and the local Brazilian authorities with the development of education.

⁵¹ L.A. Kreutz, *A educação dos imigrantes no Brasil*, in E.M.T. Lopes, L.M. de Faria Filho, C.G. Veiga, *500 anos de educação no Brasil*, Belo Horizonte, MG, Autêntica, 2003, pp. 347-370.

⁵² On this, read the study of T.A. Luchese, *O processo escolar entre imigrantes no Rio Grande do Sul*, Caxias do Sul, EDUCS, 2015.

⁵³ Chiostrri Report, January 7, 1930, pp. 4-5 in ASDMAE, AS, 1929-1935, b. 785, f. *Parte Generale*.

⁵⁴ *Ibid.*

The primary education is in full development, having made great progress throughout the State. It has been assiduous and vigilant so that, however remote it may be, there is a municipal, state, or federal elementary school, and that secondary education should offer rapid and modern courses, preparing students with certain eclecticism in which spirits and minds of youth and the practical results must be recognized⁵⁵.

However, until the early 1930s of the twentieth century, consular authorities avoided issues that might raise in the Brazilian political authorities the idea that education in Italian schools was harmful or «dangerous for the formation of a national [Brazilian] conscience» and the consequent maintenance of the *status quo* to use the words of Consul Chiostrri, from 1932 the process of reorganization of Italian schools began.

Even in the early 1930s, in spite of the progressive decline in school attendance, consular authorities of Porto Alegre considered it important to continue to support the few schools that remained, since they contributed to «slow down the phenomenon of complete denationalization» that were also affecting the Germanic community. The consul, however, considered the complete reorganization of schools to be unhelpful and inopportune if not counterproductive and called for maintaining the *status quo*⁵⁶. One of the biggest fears was in fact related to the negative reactions that the Brazilian authorities would have had through the eventual activism of Italians in a way analogous to what occurred with the Germans. In a note sent to Rome, the consul reported:

A tangible proof of this possibility was the last discussion in this House of representatives, where several deputies strongly attacked German school organizations, declaring them dangerous for the formation of a compact national consciousness, when this same instruction, even if done by German teachers, is essentially directed to the teaching of language, history and Brazilian geography⁵⁷.

⁵⁵ «Alongside this federal, state and parastatal scholastic organization, there are French and German religious orders transmitting primary and secondary instruction, and in the German zone there are several rural schools, managed by German teachers and paid by the government. In Italian areas predominated foreign religious orders and Italians are only four in the state and not very numerous and the old rural schools with the progress of colonization are disappearing. The Italian instruction made by the religious orders of Italian origin leaves much to be desired and not all of them had teaching in Italian. In general, some orders also had secondary courses, but instruction in Italian is only given in lower courses and is limited to the teaching of reading and writing, with few and few notions of history and geography. It is only in the College of Capuchins that a more complete instruction of the Italian language is given, which is also taught in the higher courses, but in the said college, instruction is limited to novices themselves. As a result of this scarce education, favored by the apathy of our settlers and the difficulties of the means of communication, almost all colonies ended up by not speaking either Italian or Portuguese, but a Venetian dialect mixed with Portuguese». Chiostrri Report, January 7, 1930, cit. pp. 5-6.

⁵⁶ *Ibid.*, p. 9.

⁵⁷ *Ibid.*

The process of reorganization coincided with the change of vertices of the Italian consulate and the arrival of Consul Carli in 1932, a figure closer to the order of fascism followed by Piero Parini's visit to Brazil in 1931.

In the urban context of Porto Alegre, the consular authorities favored and allowed a process of reorganization of the schools present and linked to mutual aid associations⁵⁸. They were endowed with a variety of characteristics, either from a curricular point of view, or from their proximity to the consulate, they were reorganized under the guidance of the Consulate, based on a single didactic direction, in which the teacher appointed to take over as director was Luigi Ledda, who was indicated directly in Rome by the General Director Piero Parini, very faithful to the fascist regime⁵⁹. Consul Carli was the first to present to the Italian Ministry and to the government of Rio Grande do Sul, the approval of reorganization programs that «provided that Italian schools did not lose the language, history and customs of the Mother Country»; at the same time, it was intended to allow the second and third generation the possibility of «not ignoring the cultural elements of the host country», which were indispensable to a career and which allowed the continuity of studies in courses which did not provide for the teaching of Italian; requested the compulsory education of Italian in gymnasiums as already occurred with French. Establishing a reorganization plan was the constitution of a new federative association capable of bringing together the eight existing Italian companies in the Capital and thus being able to ensure more direct control and greater financial resources⁶⁰.

In summary, the didactic reorganization consisted of: (a) institutionalization of the Teaching Direction of Italian Schools in RS; (b) structuring a common curriculum – Italian teaching programs; (c) consolidation of a timetable for the beginning and end of the school year, the school day and distribution of weekly workload; (d) standardization of textbooks used; (e) adequacy of the physical spaces of classrooms and schools; (f) increasing the number of students attending and follow up of school attendance; (g) regular school inspection and guidance of teachers working in schools; (h) provision of schools with necessary teaching materials and adequate to the requirements of pedagogical work; (i) organization of the calendar of celebrations and festivities of Italian schools of the Capital. Other strategies were uniform, medical and dental treatment, school meal, vacation activities (holiday camps), specific teachers for music teaching, choral singing, and physical education. The restructured Italian schools came to be called «Italian-Brazilian Schools» and the new denomination was made by the negotiations with Gaucho authorities that, in this case, provided teachers

⁵⁸ *Le scuole italo brasiliane in Porto Alegre. Origine, organizzazione, attività*, «La Voce d'Italia», September 17, 1936; see also Rech, *Escolas étnicas em Porto Alegre/RS (1877-1938): a formação de uma rede escolar e o fascismo*, cit.

⁵⁹ See the personal fascicle of the teacher in ASDMAE, AS, *Personale docente presso istituzioni scolastiche all'estero non più in servizio (1920-1955)*, b. 305, f. *Ledda Luigi*.

⁶⁰ Carli Report, May 1933, in ASDMAE, AS, 1929-1935, b. 785, f. *Parte generale*.

for the teaching of Portuguese in those schools⁶¹. The process progressed slowly in the course of the first half of 1933. Meanwhile, the Brazilian authorities verbally asserted the creation of courses for the teaching of Italian – although in an optional manner – in two schools of the Capital, Colégio Anchieta and Bom Conselho, as recognition of the negotiations for the insertion of two Portuguese teachers in two of the four Italian elementary schools of Porto Alegre⁶².

The implementation of a more organizational strategy was established under the leadership of Consul Guglielmo Barbarisi, whose actions were presented by the Italian-Brazilian press as being of a man destined to gather and unify the Italian collectivity «in a single disciplined block» after being in the Capital of the state of Rio Grande do Sul at the time when the Italian community and consular authorities had experienced strong tensions. He progressively learned to manage the conflicts generated mainly by the difficult local relationship with Dante Alighieri and to frame the entire associative world in the consular orbit; reorganized the Fascio and the National Association of Combatants. In this context, it was Consul Guglielmo Barbarisi who sought to ensure and provide resources for the consolidation of schools. On his arrival, he would face an even more precarious situation: few poorly paid teachers deprived of means and classrooms. A few days after his arrival, on June 1, 1934, the didactic direction of schools was established with local organic changes of teachers; but he especially obtained from the Ministry the attribution of four teachers⁶³. In addition to intervening to improve the four existing schools, in 1936 he created another nucleus in the Capital: the Rosa Maltoni School in the neighborhood of Menino Deus⁶⁴. Contextually, the consular authorities also tried to intervene in colonial areas, the most significant moment being the institution of a new Italian school, the «Príncipe de Piemonte», which was inaugurated in Caxias do

⁶¹ The reorganization was accompanied by an incisive newspaper campaign run by the consulate. See articles *La nuova organizzazione*, «La Nuova Italia», March 25, 1933; *Le nostre scuole*, «Nuova Italia», March 27, 1933; *Il 23 marzo, alla sede della Dante Alighieri, si sono inaugurate ufficialmente le quattro scuole italiane di Porto Alegre*, «Nuova Italia», 29 marzo 1933; By integrating the news published in the newspapers, it is observed that they are interconnected with the note transmitted by Parini. ASDMAE, AS, 1929-1935, b. 785.

⁶² Carli Report, May 1933, cit.

⁶³ The first teacher who arrived to Porto Alegre was Iolanda Ferrari, sent since March, 1934: successfully she worked in the new school «Rosa Maltoni». See Note of Piero Parini to Consul of Porto Alegre on March 21, 1934 in ASDMAE, AS, 1929-1935, b. 785, f. *Porto Alegre 1934-1935*. Only two years later, three other teachers arrived to Porto Alegre: on February 1, 1937, we have Elvezio Marini and his wife Giuseppa Natale Marini, Aniello Calabrese, who left on the same date from Caxias. According to ASDMAE, AS, Personale scolastico cessato dal servizio 1920-1955, b. 99, f. *Calabrese Aniello*; b. 339 f. *Marini Elvezio*; b. 379 f. *Natali Giuseppina*. They added to the other nine teachers Brigida Feola, Adolfo Madile, Giuseppe Lunardini, Elda Giaccioli, Amalia Sanguin, Amalia Longo, Ione Scatolari, Hoenigman Elda, Gino Battocchio. See Note of Luigi Ledda March 14, 1935 in ASDMAE, AS, 1929-1935, b. 785, f. *Porto Alegre 1934-1935*.

⁶⁴ *Le scuole italo-brasiliane in Porto Alegre. Origine, organizzazione, attività*, «La Voce d'Italia», September 17, 1936.

Pic. 2. *Visit of the Secretary of State Education, Otello Rosa to Italian schools, 1936.*



Source: Archivio Storico Diplomatico del Ministero degli Affari Esteri (ASDMAE), AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

Sul in August 1936⁶⁵. At the beginning of the 1937 school year, the state of Rio Grande do Sul had seven elementary schools: five located in the Capital, one in Caxias and one in Pelotas. According to the consul, the school institutions were in line with demands made by the government: both schools present in the urban areas and that of Caxias were presented as «born and maintained with the sacrifice of Societies of Beneficence and Instruction and are today, even if small and modest, institutions where discipline and order are standard»⁶⁶. The new school nucleus of Caxias was also presented as a «forge of Italianity»⁶⁷. Before leaving office for the successor, Barbarisi offered a better quantitative picture o

⁶⁵ *L'inaugurazione della sede della nuova scuola italiana in Caxias*, «La Voce d'Italia», August 27, 1936, p. 3.

⁶⁶ *Le scuole italo-brasiliane in Porto Alegre. Origine, organizzazione, attività*, «La Voce d'Italia», September 17, 1936.

⁶⁷ *L'inaugurazione della sede della nuova scuola italiana in Caxias*, «La Voce d'Italia», August 27, 1936, p. 3.

that of the early thirties. The Consul reported with satisfaction that the number of students enrolled in his term of office had been more than fivefold, from 120 in 1933 to 625 at the beginning of the 1937 school year⁶⁸. Teachers became twelve, with four being effective and eight acting on some of the week days. In addition, six Brazilian teachers were added to teach Portuguese. The same political authorities of Rio Grande do Sul expressed a tolerant appreciation of the progress of activities. Local newspapers on the occasion, reported the visit of the State Secretary of Education, Otello Rosa, who officially visited schools in July 1936⁶⁹.

As an economic support for schooling and education, the school board and the Italian collective also intervened to provide assistance to poor students and other collateral and complementary initiatives of Fascist education and assistance, such as the Fascist Epiphany and the first «campeggio Mussolini» [Mussolini championship], the Rosa Maltoni colony along with the endowment of materials for didactic activities⁷⁰. In order to integrate the cultural initiatives, Barbarisi continued to exert a supporting action for the development of Italian language courses. In Porto Alegre, there were night courses organized together with Domus Italia for adults and those offered daytime to students through courses organized in Caxias do Sul⁷¹. The later creation of Barbarisi was the Institute of Italian-Gaicho Culture.

Although the Brazilian political context was problematic, Italian-Brazilian schools seemed to fulfill the functions of fascist propaganda and education requested by the General Direction led by Parini. Director of Education, Luigi Ledda, in his quarterly relations sent to the Ministry, did not fail to ensure respect for such guidelines⁷² and to underline the positive results from the

⁶⁸ The number of students enrolled was distributed as follows: 168 at Dante Alighieri Elementary School, 101 at Umberto I Elementary School, 102 at Rosa Maltoni Elementary School, 40 at Elena di Montenegro Elementary School, 36 at school Elementary «Vittorio Emanuele II», 128 at the elementary school of Caxias and 50 at the elementary school in Pelotas. Telespresso of Consul Barbarisi on March 24, 1937. *Inizio dell'Anno scolastico*, in ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁶⁹ *A visita do secretario da Educação aos colegios Dante Alghieri e Rosa Maltoni*, «Jornal da Manhã», August 1, 1936; *O Secretario da Educação do Estado visitou, ontem, pela manhã, os institutos de ensino italo-brasileiros desta capital*, «Diário de Notícias», August 1, 1936; Note from Consul Barbarisi of August 10, 1936 in ASDMAE, AS 1936-1945, b. 63 f. *Porto Alegre 1936-37*.

⁷⁰ The Italian collective ensured the donation of 150 benches, 6 chairs, 66 armchairs, 6 modern cabinets, 8 blackboards. *Le scuole italo-brasiliane in Porto Alegre. Origine, organizzazione e attività*, «La Voce d'Italia» September 17, 1936.

⁷¹ Quarterly report by Didactic Director Luigi Ledda on September 23, 1937, ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁷² In the quarterly report of 1936, for example, he had written: «The school regulations in question brought together all the states of the federation and are based exclusively on the constitution of the country, which does not prohibit the institutionalization of foreign schools. Several attempts of reform that have been studied to hinder the functioning of foreign schools have so far been doomed to failure. It seems that many decades will go by until an express idea can

point of view of fascist education and did not conceal his optimism about the promising future:

Students of upper classes speak and write reasonably, love firmly and with human feeling the Fascist Italy. [...] In the school year 1938 – XVI we will see our schools better, much better. Faith will never lack⁷³.

The impulse for the development of schools was part of a more organic strategy that from the first half of the 1930s onwards, in the twentieth century, will guide the consuls on the development of all organizations in the proposal of Fascism – Mútuo Socorro, *Fascios*, *Dopolavoros*, Dante Alighieri Associations – and the mobilization for the promotion of Italian schools and their restructuring, newspapers, Italian language and culture courses, radio programs, building of monuments and festivities promotion – as a whole, all strategies of diffusion of fascist discourse, which are strategies for the construction of a sense of belonging to the «great» Italy, to Italianity, and therefore to fascism. In 1936, the «La Voce d'Italia» newspaper was created, which attempted to disseminate in the Gaucho Capital the ideals defended by Italian fascism at the time when the efforts were directed towards the acceptance, by the political leaders of Rio Grande do Sul, of the reasons for the Italian-Ethiopian conflict⁷⁴.

However, from the Estado Novo (1937-1945), Gaucho policies aimed at the nationalization of education became the focus of actions of intervener Cordeiro de Farias and also of the Secretary of Education, José Pereira Coelho de Souza⁷⁵ (1937-1945). The aspiration to forge the «new» Brazilian, the citizen identified

triumph, the country being almost all inhabited by respected and benevolent foreigners, and local schools exist only on paper. In conclusion, our schools will retain the typically Italian educational address followed by the fascist [...]» Quarterly report by Didactic Director Luigi Ledda April, May and June 1936 in ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁷³ Quarterly report of the Didactic Director Luigi Ledda on September 23, 1937, ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁷⁴ *Il Regio Console Generale d'Italia Comm. Guglielmo Barbarisi lascia Porto Alegre*, «La Voce d'Italia», April 30, 1937.

⁷⁵ In addition to the nationalization policies, this period is marked by a broad educational reform as described by Bastos and Tambara: «The expansion of the public school network was accompanied by measures to improve the teaching apparatus of Rio Grande do Sul. This meant restructuring the system, centralizing it so as to achieve the pedagogical modernization advocated by the renovating movement begun in 1937, homogenizing the educational guidelines». Camara Bastos and Tambara, *A nacionalização do ensino e a renovação educacional no Rio Grande do Sul*, in Quadros (org.), *Uma gota amarga*, cit., p. 91. For this purpose, the same authors point out that «a series of technologies were used: courses, seminars, lectures, pedagogical missions, orientation grants, comunicués. They competed more to organize the regulatory processes of pedagogy in search of a scientific organization of education administration than to promote the autonomy and creativity of teachers, as the work turned to the pedagogical practices conceived elsewhere. CPOE / RS constituted as a place that, while producing and disseminating knowledge in the pedagogical field, was established as a field of performance or application of this knowledge». Camara Bastos and Tambara, *A nacionalização do ensino e a renovação educacional no Rio Grande do Sul*, in Quadros (org.), *Uma gota amarga*, cit., p. 109.

with the Brazilian homeland, identified with the desired national unity resulted in practices. On this, Gertz warns that we need to pay attention to the fact that the nationalization action «did not reach in a linear and uniform way all groups, and there were significant differences in the evaluation of the various foreign populations that were in Gaúcho territory». The same author points out that «actions could vary from region to region, so that a certain group of «aliens» in one region could be reached with intensity very different than the same group in another region»⁷⁶.

The signs of stiffening regarding the nationalization of education in Rio Grande do Sul were numerous. One of the several episodes signaled by Italian authorities in Porto Alegre was that of September 1937 at the civic parade of September 7, the anniversary of 115 years of independence of Brazil. The Secretary of Education had decided to prevent the civic parade of students from Italian schools with the flag of Italy and the consul had to speak to the governor. The parade represented the strong ideological appeal and the desire to «reaffirm the Italian character of our schools» in opposition to the Brazilian nationalist tendencies that through the Secretariat of Education tried to «interfere more and more with foreign school institutions»:

I repeat here that the current trend against foreign educational institutions in this country is becoming stronger and that restrictive procedures are beginning to be put into practice⁷⁷.

This concern has conditioned some interventions of a clearly defensive character by consular authorities. Through a request from Brazilian authorities to learn how to legislate Italian on the issue of foreign schools and develop the writing of procedures for nationalization of education, the new Consul Santovincenzo Magno signaled to the Italian Ministry the opportunity to, considering the present moment of marked nationalism, all the characteristics of freedom of the legislation to safeguard foreign schools and to eliminate those which, on the contrary, could offer justification against the Italian schools⁷⁸, should be emphasized. It is within this context that the indications offered by the new consul Santovincenzo Magno regarding the «schools problem» that could not be marginalized but «fully confronted» will be interpreted, at a moment that indicated, with certain optimism, as if in Italian schools «year by year the number of students was increasing»⁷⁹. For these reasons, he had warned of the need to indicate «fascist clarity» the points he considered essential for the development of school organization in the state of Rio Grande do Sul. The

⁷⁶ R.E. Gertz, *O Estado Novo no Rio Grande do Sul*, Passo Fundo, UPF, 2005, p. 146.

⁷⁷ Note of September 25, 1937 in ASDMAE, AS, 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁷⁸ *Telespresso* of March 12, 1938 in ASDMAE, AS, 1936-1945, b. 62, f. *Porto Alegre 1938*.

⁷⁹ *Telespresso* of December 30, 1937 in ASDMAE, AS 1936-1945, b. 62, f. *Porto Alegre 1938*.

school issue had to be functional in defending intense Italianity with «an ever broader and deeper assertion of Fascist Italy». Specifically, he recalled that the development of elementary schools should be organically linked to other associations, seen as a single material space, the future Casa d'Italia. In addition to institution capable of ensuring continuity of schooling, for rural schools and for the management of local teachers⁸⁰, all issues on which it had transmitted precise information between August and November 1937⁸¹. A program that included schools within more complex actions that, in the continuity of their predecessors, were also engaged in the fascios all'estero, fascist aid organizations and the Church through the religious orders present in colonial areas: «We must not forget that every fascio, school, missionary must obey the exterior and a single command which is the ever wider and deeper affirmation of Fascist Italy»⁸².

The relations sent to the General Direction of the Italians and the Schools Abroad confirm in fact the wide use of contents destined to favor fascist education in Italian schools still existing in Rio Grande do Sul. The phenomenon deserves a specific analysis that in this article that we cannot develop. Just as an

⁸⁰ The provisions aimed at a radical change in the number of professionals that played the role of teachers probably were part of this perspective. Quickly, Santovincenzo moved by the most general concerns has a more «disciplined» faculty requests and obtains the replacement of all four teachers: Elvezio Marini and wife Giuseppa Natale Marini, Aniello Calabrese and Luigi Ledda. Significantly, the consul spoke of mistakes made in the past not knowing how to assess the mission with delicacy. See *Telespresso* February 10, 1938, *Relazione scuole insegnanti di ruolo in ASDMAE, AS 1936-1945, b. 62, f. Porto Alegre 1938* In his replacement, the consul was awarded the assignment of Professor Giuseppe Lunardini in June 1937, by the provisional teacher Wanda Beltrami, who assumed the position of provisional teacher in Caxias in March 1938. See in *ASDMAE, AS, Personale docente presso istituzioni scolastiche all'estero non più in servizio (1920-1955), b. 63, f. Lunardini Giuseppe; b. 50, f. Beltrami Wanda.*

⁸¹ According to Relation No. 2953 of November 25, 1937, Relation No. 2819 of November 10, 1937, Relation No. 1758/289 of August 3, 1937; Relation No. 3133 of November 25, 1937. Relations are cited in the telegram sent by consul Santovincenzo on December 30, 1937 concerning situations of teachers in *ASDMAE, AS 1936-1945, b. 63, f. Porto Alegre 1936-1937*. On the proposal to unify schools in a single building see note 1948/324 of August 19, 1937 in *ASDMAE, AS 1936-1945, b. 63*; On the establishment of a middle school in Porto Alegre, see Relation No. 1493/237 of July 5, 1937 of Consul Santovincenzo Magno in *ASDMAE, AS 1936-1945, b. 63, f. Porto Alegre 1936-1937*; On the establishment of rural schools see relation No. 1758/289 of August 3, 1937. *Ibid.*

⁸² Request of Consul Santovincenzo of two Italian priests on November 2, 1937, in *ASDMAE, AS, 1935-1945, b. 62, f. Porto Alegre 1938*. Concerning the requirement to engage religious orders, the Consul presented – to tell the truth in a rather naive manner – an explicit request to the Ministry to demand for him to request from Santa Sé to send Italian priests. The Vatican's very obvious response reminded the Ministry of Foreign Affairs that competence in the matter of sending religious belonged to congregations. Santa Sé could indicate to the superiors of the religious orders the request of Italian authorities. According to the telegram of April 13, 1938 in *ASDMAE 1936-1945, b. 62, f. Porto Alegre 1938*. Consul Santovincenzo had tried to persuade the superior of the Scalabrinians through contact with Father Tirondola, who in the period was on a special mission in Brazil. Telegram of June 14, 1938, in *ASDMAE, AS 1936-1945, b. 62, f. Porto Alegre 1938*.

example, however, it is sufficient to point out the plan of programmed activities of one of the teachers of one of the schools in the Capital that the Director of Education, Luigi Ledda had transmitted to Parini:

All teaching materials will have as purpose to develop in students the love and attachment to the distant homeland, the land where their parents were born, to Fascist and Great Italy. The little compositions, the drawing and readings showed varied notions about the life of Duce and the most memorable dates of Fascism!⁸³

Moreover, the new Director Berlingeri extolled the «redemptive work of the fascist school» against which, in his opinion, the action of the policies of local political authorities seemed to be exercised, but also those of the Portuguese teachers nominated by the Secretary of Education⁸⁴.

The effects of the education nationalization campaign on the part of the Brazilian authorities were sent with greater intensity during the new school year. In a period prior to the intervention and closure of schools, in fact, a report sent to the Ministry had underlined the strong decrease in enrollments, according to the consul, as a reflection of the harsh propaganda campaign of newspapers and political authorities of Rio Grande do Sul⁸⁵. Italian teachers were against to the process of Brazilian nationalization «encouraged by zeal and combative spirit, giving the colony the tangible proof that their children in their schools would find all the moral, intellectual and material assistance and only schools of the Fascist regime were capable of giving such a brilliant example»⁸⁶. The consul emphasized, with some optimism, the conviction that «most of the propaganda of Italianity in these lands must be attributed to Italian educators, aware of their very delicate and important mission entrusted to them by the Fascist government»⁸⁷.

⁸³ Educational program for the 2nd elementary class of the Umberto I School of the teacher Ada Carignani.

⁸⁴ Report of Didactic Director Berlingeri on the situation of the schools on April 20, 1938, in ASDMAE, AS 1936-1945, b. 62, f. *Porto Alegre 1938*.

⁸⁵ About 200 students were enrolled in schools. Besides the Brazilian nationalist propaganda, the didactic director also highlighted some other factors that contributed to lower enrollment in Italian schools. First of all, the absence of an institute in the Capital, or at least an Italian-Brazilian institute capable of educating good Italians, inclined to love, exalt and defend Italy and its institutions, its culture, its history and everything of Italian had the name and directed it. The absence of a continuity from elementary to high school, inducing many parents to directly enroll their children in Brazilian schools in order to prevent the creation of difficulties in the transition from one school and ethnic culture to another national school. The didactic director emphasized the work of thirteen teachers «as opposed to the demolishing work of nine Portuguese teachers, who acted suggesting strange elements, despising the renovating work of the fascist school, which produces civility and well-being.» Prospectus of students and teachers on April 20, 1938 in ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁸⁶ Prospectus of students and teachers on April 20, 1938 in ASDMAE, AS 1936-1945, b. 63, f. *Porto Alegre 1936-1937*.

⁸⁷ *Ibid.*

In this context, by Decree No. 7212 of April 1938, the federal intervener in the State determined that ethnic schools would teach physical education, civic education and manual labor in accordance with official guidelines. Portuguese, History, Geography and Civic Education would be taught preferably during school hours by teachers designated by the Department of Education and paid by private primary schools where they taught in a foreign language. Schools in which these teachers were harassed or did not comply with the determination would be closed. The decree also required that all private primary schools should be registered. Complementing regulations and instructing on how to register schools in the General Direction of Public Instruction, Decree No. 7247 of April 1938 was signed⁸⁸.

At federal level, Decree 406 of May 1938 is worth mentioning, which is aimed at rural schools and obliged to use didactic material exclusively in Portuguese, that the national flag should be highlighted in festivities and that teachers and directors should be born in Brazil. Regarding the curriculum, it was established that History and Geography should be from Brazil and, also, that children under 14 years should not receive education in a foreign language. The following year, in December of 1939, by Decree No. 1006, the supervision and censorship of books used in educational networks was instituted. The Decree No. 1545 of August 1939 established that the Secretaries of Education should be directed to open schools in areas colonized by immigrants and descendants. Inspection of schools, civic education stimulating patriotism, teaching the History and Geography of Brazil, express prohibition of the use of foreign languages in public activities were some of the guidelines. In March of 1940, Decree No. 2072 established the Brazilian Youth, mandatory in schools, and Decree No. 3580 of September 1941 established the prohibition of importing or printing foreign-language books for primary schools⁸⁹.

With the compulsory registration of foreign private schools established in 1938 by Cordeiro de Farias and Coelho de Souza, a total of 2,418 schools were registered, of which 241 were definitively closed because they did not meet the requirements of Decrees 7212 and 7247. Italian-Brazilian schools were among those definitely closed, which were reorganized under the auspices of fascist guidelines. A report of 1939 stated the following:

⁸⁸ L.A. Kreutz, *A educação dos imigrantes no Brasil*, in Lopes, de Faria Filho, Veiga, *500 anos de educação no Brasil*, cit., pp. 347-370; Id., *The nationalization of education in Rio Grande do Sul: preventive and repressive measures*, «Fronteiras», n. 13, 2005, p. 65-89.

⁸⁹ L.A. Kreutz, *The Education of Immigrants in Brazil*, in E.M.T. Lopes, L.M. de Faria Filho, C.G. Veiga, *500 years of education in Brazil*, Belo Horizonte, MG, Autêntica, 2003, pp. 347-370; Id., *A nacionalização do ensino no Rio Grande do Sul: medidas preventivas e repressivas*, «Fronteiras», n. 13, 2005, pp. 65-89.

The Italian consulate held five schools in the capital and three in the inner state – Caxias, Pelotas and Santa Maria, in each of which, at the request of the consulate, had a public teacher. The complaints of these teachers regarding the work of political catechesis were constant. However, they were obliged to cross their arms and watch impassively the absorption of ideological exotisms by children⁹⁰.

Even though in a small number, schools were described as centers of fascist ideological formation and as schools had not been registered, as required by the abovementioned decree, the inspector had visited them and reported that

In the presence of Mr. Berlingieri, didactic director of Italian schools, I was given the opportunity to verify how serious the situation was. The whole body of teachers was made up of elements from the peninsula, ninety percent of whom did not express themselves in Portuguese. The environment was purely Italian, seeing on the walls, in profusion portraits Mr. Mussolini, of S.S.M.M the kings of Italy, fascist propaganda signs, engraved in plaster and bronze, phrases of Duce, in no way applicable to pedagogical activity, with their warlike incitement, and even, at the expense of national sovereignty, as a great sign in capital letters stating that Mussolini, always and everywhere, was assisted by reason⁹¹.

Textbooks⁹², fascist symbols, uniforms, the presence of teachers sent by the Italian government, the records in the students' notebooks, «[...] the children would greet the masters with the Fascist salute and sing the Giovinezza»⁹³. All elements that disregarded the required and because of this situation all schools were closed and there was no reopening. In spite of this, federal intervener Coelho de Souza, with a certain recurrence discourse affirming that there were no problems of nationalization among Italian descendants and that public schools were prestigious by Italian immigrants and their descendants:

In the Italian colony, which consists of a few hundred thousand people, the problem of nationalization of education does not exist. There were very few private schools throughout the area, maintained by parishes, already nationalized, a year before the government action started, ordered by the Bishop of Caxias. The colony urges the Government to open new schools; the installation of our educational establishments is welcomed with popular festivities; the Romanesque origin of both languages makes the work of public teachers

⁹⁰ Report presented to Ex. Sr. Dr. J. P. Coelho de Souza, D. D. Secretary of Education and Public Health by the director of the administrative section, in charge of services related to the nationalization of education 1939. Public Instruction – Maço 17 – caixa 8, Arquivo Histórico do Rio Grande do Sul (henceforward AHRGS).

⁹¹ *Ibid.*

⁹² On the changes in Italian legislation and policy on textbooks in the Liberal period and then during Fascism, see the volume of A. Barausse (ed.), *Il libro per la scuola dall'unità al fascismo. La normativa sui libri di testo dalla legge Casati alla riforma Gentile (1861-1922)*, 2 vols., Macerata, Alfabetica Edizioni, 2008; A. Ascenzi, R. Sani (edd.), *Il libro per la scuola nel ventennio fascista. La normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizioni, 2009.

⁹³ Report presented to Ex. Sr. Dr. J. P. Coelho de Souza, D. D. Secretary of Education and Public Health by the director of the administrative section, in charge of services related to the nationalization of education 1939. Public Instruction, cit.

in the less nationalized centers very easy. They are, precisely, municipalities of Italian colonization that have greater number of state educational establishments; the mayors of Guaporé, Prata and Jaguari are proud to present groups in all district headquarters besides isolated schools in outlying lines⁹⁴.

Consulting the Italian documentation and looking at the vision of Educational Director Berlingeri, transmitted to Consul Santovicenzo and to the Ministry, it was stated that the School Inspector of the State Secretariat of Education had obtained the order to immediately close Italian schools «not having been registered with the General Direction of the Public Instruction». The Italian Didactic Director stated that he was «astonished and surprised» by the action and tried to prevent the closure, claiming the full legality of schools, legitimized by the presence of teachers sent by the government teaching Portuguese as well as Brazilian history and geography. Through the firmness of the Brazilian Inspector and as a more lenient form of resistance, the Didactic Director, on the advice of the Consul, had given up the idea of opposing, favoring the inspector's requests, leaving nothing else than to communicate to the Ministry of Foreign Affairs in Italy the discomfort experienced⁹⁵. The reaction of the Didactic Director reveals, however, how the consular authorities underestimated the issue, including the Italian Embassy.

A few days after the official positioning for the closure of schools, Santovicenzo had expressed to the Ambassador the conviction (and hope) that the decree «would not reach schools in which, unlike others, Portuguese was regularly taught»⁹⁶. It was this conviction that partially determined the rejection of the procedure of registration of Italian schools mandatorily determined by the Decree.

The attitude of the Consul of Porto Alegre, Santovicenzo Magno, was initially led by some preliminary disregard about the ability of Brazilian ruling classes to apply legislative decisions consistently. If, on the one hand and for more than one occasion, the consul had pointed out to the ambassador in Rio de Janeiro the progressive growth in the local press of news about the nationalization of education, on the other, he pointed out the «lack of preparation and means to subsidize an autonomous school structure by the government». Initially, even a positive opinion prevailed. On April 8, he wrote to Loiacono:

⁹⁴ *Ibid.*

⁹⁵ «I had the painful impression of being constrained to destroy in a few minutes what, with sacrifice and labor, had been built over many years by professors, connations, and our leaders, which had so much faith in the work of Italianity in these schools». Note of May 25, 1938. M. Berlingeri in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

⁹⁶ Telegram N. 1046/201 of April 3, 1938, Nationalization of schools in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

On the whole, however, the new regulations do not seem to bring about any changes to us, rather, it seems to represent some improvement in the state of complete indecision so far as to the legality or not of our schools⁹⁷.

Through the growth of nationalism, the consul had, above all, recommended cautious actions to prevent irritation reactions by the Brazilian authorities. These are mainly statements published in Italian-Brazilian fascist periodicals, such as that published on the occasion of the arrival of the new Didactic Director Mariano Berlingeri, welcomed as «sent by the fascist government»⁹⁸.

On the other hand, but no less simple, was the attitude of the ambassador. Loiacono had responded to Santovincenzo with a telegram in which he divided the idea that the procedures were not «carriers of substantial changes, but rather, they define and legitimize the existence of our schools». Regarding the problem of symbols that recalled the Italian State, he wrote:

As for the paintings of His Majesty, the S.E. the Head of Government, etc... They will not change anything to the existing state of affairs and the growing imposition of the local authorities, fulfilled on the one hand, and on the other, they will inform me immediately so I can return with requests to the Federal Government. As for the announcements regarding teachers arriving in Brazil sent by the fascist government, the Royal Ministry of Foreign Affairs will certainly take into account the need to avoid such qualifications also in passports, hoping that they are not really interested in using them, as is usually the case, by the irresistible weakness of giving importance⁹⁹.

He then sent a telegram to all the consuls in which he informed the following instructions:

In interpreting Presidential Decree No. 383, the worst thing that could happen is to let them mutilate our schools and our symbols in the course of the measures that could be applied. In order to interpret and apply the decree, it occurs that local authorities had initiatives that could be very elastic and could be solved with different treatments, not always so severe, which could lead to discrimination that we, for our always loyal attention to Brazil and undeniable affinity, could also expect. Mr. Loro will refrain from taking measures to provide the interpretation of the decree, hoping to receive guidelines and warnings from local authorities, which would like to be readily informed. This will test the true attitude of federal authorities in dislodging our positions because we do not know and if to what

⁹⁷ Telegram from Consul Santovincenzo to the Embassy of Rio de Janeiro on April 8, 1938, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

⁹⁸ *Ibid.* The consul referred, for example, to the article *A Direção das escolas primarias italianas em Porto Alegre*, «Correio do Povo», April 8, 1938.

⁹⁹ Telespresso of the R. Ambassador Loiacono of April 13, 1938 in ASDMAE, AS 1936-1945, b. 62, f. *Porto Alegre 1938*.

extent they wish to dislodge us. Meanwhile, the attitude of the collectivity will continue to be, as always, with a spirit of loyalty and collaboration, avoiding reactions and campaigns that could cause strong reactions and new campaigns on the part of those who inevitably hold the 'knife by the handle'¹⁰⁰.

In a new telegram, Loiacono confirmed:

The evident danger that derives from the attitude of some consular offices that have adopted some adjustments to satisfy Brazilian local authorities in the life of our institutions was affected by Decree No. 383. It is evident that any authority for more willing to close one or even both eyes on our organizations could not refuse to comply with the strict application of the decree if invited by us to solve a problem. It is therefore necessary to avoid such procedures and simply to continue so that one decision does not affect all. Against this latter eventuality, I order that the royal consulate respond responsibly but evasively, saying that they reserve the right to communicate with the Royal Embassy¹⁰¹.

Through a series of interviews given to the press, the Consul tried to assure the support of the public opinion, guaranteeing that Italian-Brazilian schools fulfilled the requirements established by the decree¹⁰². The eminence of the promulgation of closure, even if feared in some way¹⁰³, was received with some surprise, above all by the total absence of reserved communications with the purpose of anticipating to the Consul the presentation of such procedures by the Brazilian authorities. This situation, on the other hand, according to what Santovicenzo Magno had written, had been the subject of Minister Cardoso's commitment, with which the Italian consular authorities had close links. With the sudden death of the minister, according to the Consul, there had been an acceleration of actions of nationalist accent by Secretary of Education Coelho de Souza and the loss of control over preventive information¹⁰⁴.

After the publication of the Decree, the political educational authorities of Rio Grande do Sul granted the Italian authorities a period of extension for the presentation of the documentation necessary to regularize schools according to the guidelines of the new procedures, but no guarantee was

¹⁰⁰ Telegram 5893 of the R. Ambassador Loiacono of April 21, 1938 in ASDMAE, AS 1936-1945, b. 64 f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

¹⁰¹ Telegram from R. Ambassador Loiacono of May 10, 1938, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo.

¹⁰² See Telespresso of May 28, 1938 in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

¹⁰³ See Telespresso of May 18, 1938 in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile* with which Santovicenzo communicated to the Embassy about the article in which Coelho de Souza stigmatized the absence of some school institutions. The Secretary of Education of Rio Grande do Sul, in an interview had warned: «Certain schools appear to be unknowingly ignoring the enactment of these measures. Those who remain in this attitude until the day after the closure of the records will be closed». *Os problemas do ensino em todo o estado focados pelo titular da pasta da educação*, «Diário de Notícias», May 10, 1938.

¹⁰⁴ Telespresso of May 28, 1938, cit.

given on the possibility of adopting a line of greater tolerance, as requested by Santovicenzo¹⁰⁵, which the consul continued to postpone, waiting for more specific indications from the ambassador, which were slow to arrive. On the other hand, the same Consul did not conceal his belief that the draconian measures taken by the decree would have a temporary character and that in time greater conditions of tolerance and availability would be restored. The Consul assigned the press, for the many interviews with officials ready to show their zeal and their patriotic sense, one of the main responsibilities of the favorable climate for the decision¹⁰⁶.

The silence and waiting for the ambassador's position in the following months was perceived with increasing concern by the Consul of Porto Alegre, who often requested a more specific response from the Ambassador¹⁰⁷, who showed some irritation at the insistence of the consular authority of Porto Alegre. In reply to one of the numerous *telespressos* sent by Santovicenzo Magno, the Ambassador wrote:

It is not conceivable that, in a matter as important as that concerning the closure of 'Dante Alighieri' schools, I would leave it without instructions if I had the power to do it, but on the contrary, I cannot, since it depends on negotiations with the government. [...] As things stand, I wanted to give you instructions. These could be the alternative: either adapt to closure or adapt to the decree. Because I do not think that things are compromised to the point of another hypothesis, we have to wait for the result of the maturation of this government towards some solution less totalitarian and harmful for us. We should wait with serenity that this eventuality – which I cannot guarantee, however – is a work of opportune aid to the spirit of resistance, with which this Embassy seeks to deal with the things and the negotiations that I lead; asking for instructions at any cost means pushing my work to a hasty resignation¹⁰⁸.

The ambassador continued to hold a waiting position, wishing to curb the impetus of the consul of Porto Alegre, who was also asked to inform the secretary of the local Fascio, always more alarmed about the effectiveness of the nationalization policy of education derived from policies of Rio Grande do Sul¹⁰⁹, and this occurred a few days before the first indication given to the

¹⁰⁵ See telegram 25, May through which the Consul informed the Embassy of Rio de Janeiro about the success obtained with the meeting with Coelho de Souza. ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

¹⁰⁶ Telespresso of May 28, 1938, cit.

¹⁰⁷ On May 18, for example, Santovicenzo wrote to Rio de Janeiro to report the conversation with the Secretary of Education Coelho de Souza, which, according to the Consul, had had the taste of threat, above all, from Italian school institutions. Reason why «I cannot recommend keeping at our expense schools that of Italians would have nothing more».

¹⁰⁸ Telespresso of June 27, 1938 in ASDMAE, AS, 1936-1945, b. 62, f. *Porto Alegre 1938*.

¹⁰⁹ According to Fascio Fernando Chiappini, the situation was compromising not only for schools but also for all fascist organizations. Cf. Note of the Secretary of the Fascio Fernando Chiappini of June 8, 1938, in ASDMAE, AS 1936-1945, b. 64, f. *Porto Alegre*.

Consul of Porto Alegre, when the Ambassador had received a communication from Minister Ciano, very clearly in the paragraph below:

In principle, it is preferable to proceed with the closure than to accept the nationalization of our activities. I remember that even if there may be eventual resignations in the other states, we should try to maintain our positions in such a way that it is possible in the state of São Paulo¹¹⁰.

The conditions of difficulty detected by the Italian consular authority in the state of Rio Grande do Sul were also intended to be extended to the following year. The communications of the Consul sent to the Ministry of Foreign Affairs in the second half of 1939 specified the situation of Rio Grande do Sul and the permanence of a hostile attitude, the difficulty of reaching agreement as in other units of the federation and the attempt to request that the Embassy took a more determined attitude in order to «stop the odious anti-Italian journalistic campaign» and anti-fascist that at the same time, in some situations «offended the figure of the Duce»¹¹¹.

The nomination of Rio de Janeiro to arrange the registration as provided for in Federal Decree No. 383 had arrived only in October 1938¹¹²; a decision that the Council was very skeptical about, considering that it was very likely to be insufficient for the survival of schools in Porto Alegre due to the provisions of state authorities to register and the much more restrictive measures provided for by the State Decree of 8 of April by the Secretary of Education¹¹³. It was a position that led the Ambassador to consider, in a note sent to Rome, the position expressed by the Consul not to reopen schools in the capital of Rio Grande do Sul and proposed direct resources to replace schools with language courses and to construct a common space for the Italian collectivity: the «House of Italy»:

It seemed strange that in that consular jurisdiction, we are bound by draconian procedures against our schools, and even though in the other states of Brazil, the various consuls have been able to find formulas to adjust in such a way to present the registration requests without the need to completely resign the Italianity character of schools, at the moment I

¹¹⁰ Telegram from Minister Ciano to the Italian Embassy on May 21, 1938 in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

¹¹¹ Note of Consul Santovincenzo of September 22, 1939, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

¹¹² Telespresso from the Italian Embassy on October 3, 1938, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo.

¹¹³ Telespresso of Consul General Santovincenzo of October 19, 1938 in ASDMAE, AS 1936-1945, b. 64, f. San Paolo. Telespresso of December 9, 1938 in ASDMAE, AS 1936-1945, b. 64, f. *Parte generale*.

do not believe that it is possible to change the attitude and, therefore, I express a humble opinion that, with respect to the jurisdiction of Porto Alegre, it is convenient not to reopen the schools any more. Therefore, it will be necessary to provide a new system for the teachers employed there¹¹⁴.

Concluding remarks

It was evidenced that since the end of the 19th century, at least among populations of the Italian colonial region, public schools were requested by means of petitions, and making use of different justifications¹¹⁵. However, one cannot fail to take into account that the laws of nationalization were felt among this ethnic group. It should be emphasized that among those who most adhered to the fascist ideas were industrialists, merchants and Italian-gaúcho individuals who were prominent in the gaúcho political-economic scenario. For these, the laws of nationalization and even of education have hardly reverberated. With legal impositions, they soon became nationalists, immediately identified with Brazil¹¹⁶. Settlers living in rural areas little or nothing knew about Italian fascist propaganda. In addition, with regard to the nationalization of education, as Luchese states «among the Italian immigrant groups themselves, there seems to have been no resistance, but negotiations, since public schools were highly needed and considered necessary»¹¹⁷. The gratuitousness of public schools and the mastery of Portuguese were objective issues desired by most immigrant and descendant families.

The end of the experiences of Italian-Brazilian schools that had accompanied the development of the state of Rio Grande do Sul during the twenties and thirties did not come, however, with diplomatic changes. In fact, the first approximation during the twenties and thirties of the twentieth century did not come with diplomatic changes. It is worthwhile to deepen the investigation by looking at events that accompanied the years of 1939 and 1942, during which it was hoped that the condition of great difficulty experienced by Italian authorities in the State of Rio Grande do Sul would continue. It was at this stage that the communications of the Consul sent to the Ministry of Foreign Affairs continued to emphasize the specificities of the situation of the state of Rio Grande do Sul and the permanence of a hostile attitude, the difficulty of registering «the conditions established in other territorial units»; and they

¹¹⁴ Telespresso from the Italian Embassy on October 3, 1938, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo.

¹¹⁵ Luchese, *O processo escolar entre imigrantes no Rio Grande do Sul*, cit.

¹¹⁶ Giron, *As sombras do Littorio: o fascismo no Rio Grande do Sul*, cit.

¹¹⁷ Luchese, *Abrasileirar os coloninhos: histórias e memórias escolares na região colonial italiana do Rio Grande do Sul (1937-1945)*, cit., p. 224.

resumed requests for the Italian Embassy to take a more determined stance in order to «stop the odious anti-Italian and anti-fascist press campaign», while at times it had «even offended the figure of the Duce»¹¹⁸. The deepening of the research can advance with the analysis of the events resulting from the mediation of the nationalization in a longer time period.

¹¹⁸ Notes of Consul Santovincenzo on September 22, 1939, in ASDMAE, AS 1936-1945, b. 64, f. San Paolo, sf. *Propaganda straniera contro nostre scuole nel Brasile*.

An italian book for brazilian children. *Heart*, by Edmondo De Amicis (1886)*

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ABSTRACT: In Brazil, the Library Francisco Alves published *Coração. Diário de um menino* [Heart, Diary of a boy] by Edmondo De Amicis (1846-1908), in 1891, a few years after it was published in Italy. In the first Brazilian edition, the book is presented as a «remarkable book of moral and civic education – a masterpiece among books for reading». It was systematically published again and again by Francisco Alves until 1968, when it had its 53rd edition. This work influenced our authors of books for children and adolescents; it inspired the authors of reading books for elementary school, and it was also recommended for children/boys aged from 9 to 13 years – «gospel of many generations», awarded as a prize to outstanding pupils in school. The intention of the present study is to analyze the book from the perspective of forming civic and moral virtues, and of strengthening the national character during the First Republic. In that period, moral, civic and religious education became the axis of the concerns of those who aspired to eternal control of social relations and structures, as a way to regenerate the country. Considering the work of De Amicis as a *bildungsroman*, it is intended to analyze the historicity of the discursive process regarding the education of the national character/formation of civic and moral virtues of the future citizen, and to reflect on how the reader plunges into these readings and their formative effects based on their remembrances.

EET/TEE KEYWORDS: Children's literature; Reading memories; *Bildungsroman*; Edmondo De Amicis; Brasil; XXth Century.

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Introduction

Messrs. Alves & C., our main schoolbook publishers, at the end of last year announced the following books: *Curso de geografia geral*, *Elementos de cosmografia*, *Rudimentos de corografia e Geografia Atlas de Couturier* [Course of General Geography, Elements of Cosmography, Rudiments of Corography and Geographic Atlas of Coutourier] all of them by Mr. João Ribeiro, *Coração* [Heart], ed. by De Amicis, this masterpiece among reading books.

José Veríssimo, 1891¹

Livraria Francisco Alves² published *Coração. Diário de um menino*³ [Heart, Diary of a boy] by Edmondo De Amicis⁴ (1846-1908)⁵, in 1891, a few years after it was published in Italy⁶. In the first Brazilian edition, the book is

¹ M. Lajolo, R. Zilberman, *A Formação da Leitura no Brasil*, São Paulo, Ática, 1996, p. 155.

² About Livraria Francisco Alves and its publishing house (1854), see A. Bragança, *Francisco Alves. Eros pedagógico: a função editor e a função autor*, São Paulo, Escola de Comunicações e Artes /USP, 2001 (Tese de Doutorado).

³ D'Amicis decided to write this book when he accompanied his two children to elementary school and found the teaching material poor. He thought of writing a reading book that could be used in elementary school classes. In 1886, he wrote two books: *Romance de um professor*, published only in 1890, and *Coração*, which was an immediate success going beyond the borders of Italy, although it was rejected by the Catholics, since it is considered a book without God, that advocates the desacralization of the Christian civilization, laicization and resacralization around the nation. P. Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux* (XIX et XX siècle), Paris, Belin, 2007, pp. 517, 539.

⁴ The Brazilian edition adopted the Portuguese way of writing the Italian name Edmondo De Amicis.

⁵ Edmondo De Amicis (1846-1908). Italian writer. Attended Military School in Modena. Took part in the Austro-Prussian war and remained in the army until the occupation of Rome in 1870. He was the director of the Florence newspaper «A Itália Militar» (1867); he published his first work *A Vida Militar*, in 1868, with stories on the soldiers' life. This book achieved immediate success. In 1871 he went to live in Torino and travelled several times through Europe and Africa. He wrote many books: *Novelas* (1872), *Recordações de 1870-1871* (1872), *Espanha* (1872), *Holanda* (1874), *Recordações de Londres, Marrocos* (1876), *Constantinopla* (1877), *Recordações de Paris* (1878), *Poesias* (1880), *Os amigos* (1882), *O Portão da Itália* (1884), *Coração* (1886), *Sull' Oceano* (1889), *Romance de um Professor* (1890), *A Professora dos Operários* (1895), *O Carro de Todor* (1899); *Esperança e Glória* (1900), *Memórias da infância e da escola* (1901), *Socialismo e Pátria*, *Os Inimigos do Socialismo*, *Amor e Ginástica*, *Idioma Gentil* (1905), *Página Alegre* (1906). His works focus on three central aspects: country, school age youth and the low income population. A moderate monarchist, after 1890 he became an ardent socialist who placed his fame at the service of the victims of his day – workmen and immigrants – without losing interest in school and in the Italian language. About the stories of his trips see Rod (1884). About the short story *Sull'Oceano*, see R.C. Silva. *Em alto-mar: narrativa de uma travessia*, São Paulo, FFCH/USP, 2006, Dissertação. Mestrado em Língua e Literatura italiana/ Programa de Pós-graduação em letras da Faculdade de Filosofia e Ciências Humanas/USP).

⁶ In Italy, two and a half months after the first edition, there had already been 40 printings, by 1896, there were a total of 197. *Ibid.*, p. 6.

presented as a «remarkable book of moral and civic education – a masterpiece among books for reading». It was systematically published again and again by Francisco Alves until 1968, when it had its 53rd edition⁷.

This work influenced our authors of books for children and adolescents⁸; it inspired the authors of reading books for elementary school⁹, and it was also recommended for children/boys aged from 9 to 13 years – *gospel of many generations*, awarded as a prize to outstanding pupils in school¹⁰.

Coração has been widely read and adopted at schools¹¹ one hundred and twenty-five years after it was first published in Italy. The Cosac &

⁷ It was not possible to trace all the editions of Francisco Alves and the number of volumes. This makes it impossible to do what Roger Chartier recommends – «a strict reconstruction of the history of its composition and printing at the typographer». For him “understanding this process of book production means describing and analyzing the physical characteristics of the copies of the edition (or editions) of the text involved. [...] These formal measures aim at forcing reception, controlling interpretation and qualifying the text». R. Chartier, *À Beira da Falésia. A História entre certezas e inquietudes*, Porto Alegre, ed. UFRGS, 2002, p. 245.

⁸ According to Pfromm Neto (1974, p. 174), *Coração* influenced our writers of reading books, as can be seen in the works by Romão Puiggari and Arnaldo de Oliveira Barreto, Bilac, Júlia Lopes de Almeida, Scaramelli and others. The school book of José Scaramelli – *Coisas de Nossa Terra* –, was even announced by the editors as an imitation of Heart, adapted to the national scenarios and characters. *Coração Brasileiro. Palestras moraes e cívicas (1920)*, by Francisco Faria Netto, follows the same structure as the book by Amicis, with seventy-two talks – stories experienced by a boy in everyday school life. The structure of the book presents differences as to: illustrations; at the end of each talk there are explanations about the vocabulary; sayings by famous thinkers emphasizing the moral and civic precepts, poems, poetry and songs. This book was adopted by the governments of Bahia and São Paulo for the second year of elementary school (S. Pfromm et alii, *O Livro na Educação*, Rio de Janeiro, Primor/INL, 1974, p. 174).

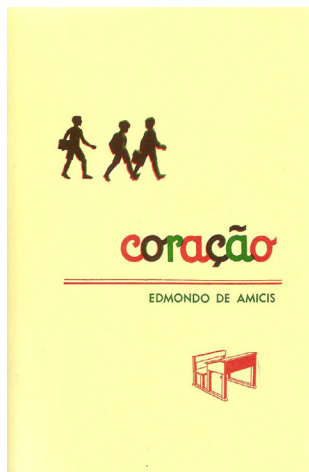
⁹ R.C. Silva cites as an example the graded series of reading books by Puigarri-Barreto in which a narrator tells the story of Paulo and his interaction with family, at school, with friends and teachers. Each book corresponds to one year at the protagonist's school. Silva, *Em alto-mar: narrativa de uma travessia*, cit., p. 9.

¹⁰ The front page of the copy researched (1954) highlighted that it was given as a *Souvenir of the Porto Alegre Rotary Club*, in the competition for «The Best Classmate», at Grupo Escolar Antônio de Faria, a municipal elementary school, in the class of schoolmistress Edi Puger, on November 26, 1955. It is bound. Also Nilson Souza, in his chronicle *Vidas no Sótão* (2008), recalls «I still have *Coração*, by Edmundo De Amicis, which I received at the age of 11 thanks to the generosity of my classmates in the fifth grade, who chose me as the best Classmate in a promotion that used to be held by the Rotary Club». Nilson de Souza, remembering his schooldays also points out that he received the book in the promotion «The Best Classmate», of the Rotary Club International, in 1960, at Grupo Escolar Dr. Ferreira de Abreu (2011). N. Souza, *De volta à escola. Uma emoção de 50 anos*, Porto Alegre, Zero Hora, 2011, p. 24; *Vidas no sótão*, Porto Alegre, Zero Hora, Segundo Caderno, sábado, 10 de maio de 2008. p. 3.

¹¹ In the School Reform of Ceará State (1922), among the books adopted in the second grade of elementary school is the work by Edmundo d'Amicis. R. Nogueira, *A Prática Pedagógica de Lourenço Filho no Estado do Ceará*, Fortaleza, Editora UFC, Brasília, INEP, 2001. p. 152.

In Santa Catarina State, in the Orestes Guimarães School Reform (1911), it was also listed for acquisition and adoption in the municipal elementary schools. Also the «Série Graduada Fontes», by Henrique Fontes (1921-1931), includes excerpts from Amicis' work. D. Prochnow, *A Série Graduada Fontes no contexto da Reforma Orestiana (1911-1935)*, Florianópolis, PPG/UFSC, 2008. Projeto de Dissertação de Mestrado em Educação.

Pic. 1. *Caption: Editora Cosac & Naif cover (2011).*



Source: Edmondo de Amicis, *Coração*, São Paulo, Editora Cosac & Naif, 2011, cover.

virtue and generosity in the unforgettable pages of this admirable book. A standard of school literature to which the genius of De Amicis gave immortal life in a moment of creative inspiration¹⁴.

The intention of the present study is to analyze the book from the perspective of forming civic and moral virtues, and of strengthening the national character

The newspaper *Folha de São Paulo*, on October 12, 1997 (pp. 3-9), cites *Coração* among the most sold foreign books in the 1920s and 1940s in Brazil.

¹² The edition presents an interesting novelty: a three-color cover (yellow, green, light blue) with a printing of 4000 copies. E. Amicis, *Coração*, São Paulo, Cosac&Naif, 2011.

¹³ Some of the news stories were published in newspapers with a daily circulation and in specialized journals. For instance, «A Narrativa do Aprendizado. O Lançamento de *Coração*, clássico romance de formação italiano, mostra a vitalidade de um tipo de literatura que se especializou em retratar os ritos do amadurecimento». E. Mendonça, E. Murano, *A Narrativa do Aprendizado*, «Metáfora. Literatura e Cultura», vol. 1, n. 3, dec. 2011, pp. 54-59.

¹⁴ For instance, in São Paulo, in the *Relatório* by Alfredo Pujol (1896, p. 46), there is a reference to the adoption of the book at public schools – «regarding the books, I believe that the State should limit itself to distributing books that are instructive and literary reading. [...] Among the former we adopted Método de Leitura by professor Arnaldo Barreto, the works of João Köpke and of D. Maria Guilhermina de Andrade, *Coração* by De Amicis, *Contos Infantis* by Julia Lopes, *As crianças e os animais* by Mme Susana Cornaz. The reading books should be widely distributed and their choice should be varied, giving teachers the opportunity to dedicate themselves to didactic literature which is still very poor in our country». A. Ávila, *Literatura Infanto-Juvenil*, São Paulo, Editora do Brasil, 1968.

Naif publishing house re-published it (2011, 352 pp., 12 il.), with an 1886 translation from the original¹². It has a postface, by Antonio Faeti and a bibliography, in which the entire works of the author (fiction, travel literature, essays, memoirs) are listed; the translations and adaptations of his works in Brazil (Holland; Morocco; The small *vidette* of Lombardy); *Heart* in other languages; studies, essays and critiques; biographies published by the author; adaptations of the book for film and television¹³. In 2012, Editora Autêntica (Belo Horizonte/MG), published *Cuore* [Heart], with illustrations by Daniel Hazan and translation by Maria Valéria Rezende (pp. 271).

According to D'Ávila (1968), the powerful influence exerted by this book on Brazilian readers of all ages was unequalled by any other book. He considers it an

objective, pure, generous and honest book that moved the entire world. All of Brazil, especially the generation that began in this century, learned the lesson of work, patriotism,

during the First Republic. In that period, moral, civic and religious education became the axis of the concerns of those who aspired to eternal control of social relations and structures, as a way to regenerate the country¹⁵.

M. Lajolo says that traditionally,

the focus of literature in Brazilian schools tends to take on the function of education through literature. The character as a model and example of the literary text is constant in the presentation of school books from any time period. This ultimately identifies literature with lectures on moral, civic and family issues. The literary text is privileged not for its esthetic dimension but for the rhetorical and persuasive dimension, as a convincing vehicle of certain values that the school should impart, strengthen and generate¹⁶.

Considering the work of De Amicis as a *bildungsroman*, it is intended to analyze the historicity of the discursive process regarding the education of the national character/formation of civic and moral virtues of the future citizen, and to reflect on how the reader plunges into these readings and their formative effects based on their remembrances¹⁷.

Formative readings or readings for learning purposes are those in which «social institutions such as the family, school, church, factory, hospital, through which the hero of the story passes, seek to influence him, mold him, give him direction, according to their values and specific norms»¹⁸. Rousseau and Durkheim believe in the possibility of educating the young in morals, as they advocate the social need for this education. Thus, *Coração* is considered formative reading, since it aims at educating and molding the readers, from the perspective of teachability of morals or of virtues. It also has a biographical dimension, in the confessional narrative form used to recount experiences and suffering, the circumstances of life and the key-experiences in the life of the narrating author, namely, the representation of the world given by the author. It is a reading book with a moralizing function and an educational, civic, patriotic and social intention.

As we focus our study on the work of De Amicis, we believe that this work is a discursive unit that produces, «organization (ordenamento), affirmation of

Pic. 2. Caption: *Editora Autêntica cover (2012)*



Source: Edmondo de Amicis, *Cuore*, Belo Horizonte, Editora Autêntica, 2012, cover.

¹⁵ M. Kuhlmann Jr., *As Grandes Festas Didáticas. A Educação Brasileira e as Exposições Internacionais (1862-1922)*, São Paulo, USP/FEUSP, 1996, Tese Doutorado em Educação. p. 228.

¹⁶ M. Lajolo, *Usos e abusos da literatura na Escola. Bilac e a literatura escolar na República Velha*, Rio de Janeiro, Globo, 1982, p. 15.

¹⁷ M. Bakhtin, *Estética da Criação Verbal*, São Paulo, Martins Fontes, 1992.

¹⁸ B. Freitag, *O Indivíduo em Formação*, São Paulo, Cortez, 1994. p. 68.

distances, of divisions»¹⁹, and that it is representative of the values of Brazilian illustration as to the Republican pedagogical project of forming the «new man» for the «new regime»: his belief is illustrated in the virtues of moral and civic instruction as a way of maintaining social order.

Literature and education: formative reading

The beginning of Brazilian literature for children and youths, at the end of the 19th century, is marked by the transplantation of European themes and texts adapted to national reality, with a formative and patriotic mission. Based on the translations of *Selected Tales of a Thousand and One Nights*, *Baron Münchhausen's Adventures*, *Robinson Crusoe*, *Heart*, and the Brazilianized versions of texts by Perrault, Grimm and Andersen, children's literature uses the cult of civics, and patriotism as a legitimizing pretext to recruit its public. *Le tour de la France par deux garçons* (1877), by G. Bruno, and *Cuore* (1886), by De Amicis, appear to form the inspiring matrices of works that became true textbooks of nationality, such as *Através do Brasil* [Through Brazil] (1910), by Olavo Bilac and Manoel Bonfim; *Por que me ufano do meu País* [Why I am proud of my Country] (1901), by Afonso Celso²⁰, and so many others. The greater support to schools, in the first decades of the Republic and the civic campaigns to modernize the image of the Country favored the development of Brazilian children's literature and its ideologically conservative ballast²¹.

Veríssimo, in *A Educação Nacional* [National Education] (1890), denounced the weakness of our national feelings due to the fact that we had never thought about having a national education. As a solution to this problem, he suggests that civic education be generalized throughout the instruction given at school, as an essential consideration to form the moral and intellectual culture. For the author, «to be national an education must inspire feelings for the Fatherland, which directs it at a patriotic purpose». Strengthening the national feeling also required educating character, understood to be like moral education, precepts, rules, examples, advice, moral remarks on facts of school life and history; and physical education – which toughens the body and ensures health. Education of the character is considered an essential element of our national education, it must aim at combatting everything in use that depresses our character, at the same time developing the opposite qualities. From this perspective it involved

¹⁹ R. Chartier, *A História Cultural: entre práticas e representações*, Lisboa, Difel, 1990, p. 28.

²⁰ About this, see: M. Bastos, *Amada pátria idolatrada: um estudo da obra 'Porque me ufano do meu país', de Afonso Celso*, «Educar em revista», vol. 20, 2002, pp. 245-260.

²¹ R. Zilberman, M. Lajolo, *Um Brasil para crianças. Para conhecer a literatura infantil brasileira: histórias, autores e textos*, São Paulo, Global, 1986.

education of the will and the development of the spirit of discipline, sympathy, solidarity. Outstanding for this mission are: Family, School, Society, Religions, Politics, Literature, Science and Art²².

The author considers literature and reading important mechanisms for civic and moral education, and, pointing to the absence of a civil and moral culture, he accuses books for reading – «the real mainspring of teaching», – as mainly responsible for this situation. Transcribing his words in order to better understand their meaning:

it is the foreign authors who, translated, transposed, or at most servilely imitated, educate youth. Let me present a personal memory. My studies from 1867 to 1876 were always in foreign books. The first books I read were Portuguese and completely ignored Brazil. The Manual Enciclopédico de Monteverde (Encyclopedic Manual of Monteverde), Vida de D. João de Castro (Life of Dom João de Castro), by Jacinto Freire(!), the Lusiads, by Camões and, later at Colégio D. Pedro II, the seven Portuguese books of selected readings by Aulete, the Ornamentos da Memória (Ornaments of Memory), by Roquete – were the books in which I received my first lessons. And this is how it certainly was for everyone of my generation²³.

Based on this finding, Veríssimo suggests that there is a great need to renovate the reading book: «it must be Brazilian, not only made by Brazilians, which is not the most important aspect, but Brazilian in its topics, its spirit, by translated authors, by reproduced poets and by a national spirit that will act as a stimulus»²⁴.

This recommendation covers a contradiction, because at the same time as it suggests Brazilianising the reading book, it allows translations and reproductions of foreign authors. From this perspective, he considers the book by De Amicis, *Coração, livro para rapazes* [Heart, a boys' book] an exception, which in Italy had 101 editions in four years, proving its significant role and that it should be adopted in the Brazilian school system.

In the journal «Revista Pedagógica»²⁵ of February 1892, José Veríssimo publishes a long article about the work of De Amicis under the title *Educação Nacional (a propósito de um livro italiano)* [National Education (about an Italian book)]. In the fourth Brazilian edition, in 1894, it is included under the title *Um estudo sobre De Amicis* [A study on De Amicis] in which he explains this exception:

The book is eminently Italian in its inspiration and in its concept, in its subject and in its purpose, in its spirit and in its dominant and exclusive idea. I do not know of any school today, that has such a complete manual of moral and civic education. It will teach Brazilian

²² J. Veríssimo, *A Educação Nacional (1890)*, Porto Alegre, Mercado Aberto, 1985, p. 55.

²³ Id., *A Educação Nacional (a propósito de um livro italiano)*, «Revista Pedagógica», vol. 3, nn. 16-17, 1892, p. 55.

²⁴ *Ibid.*

²⁵ About «Revista Pedagógica» (1890-1896/1919), see: M. Bastos, *Pro Prætia Laboremus. Joaquim José de Menezes Vieira (1848-1897)*, Bragança Paulista/SP, ed. USF, 2002.

schoolchildren the highest and most sympathetic morals; but it will only speak to them of a fatherland that they do not know and cannot love, and whose life and glories, whose struggles and triumphs, are indifferent to them. Thus, for our school the greatest value of this book is lost. It would be more useful to have not a translation, but an adaptation or imitation. However, is not every such imitation of a book a pastiche?²⁶

The author's emphasis is on the argument that he considers «the fundamental gap in our public education: the absence of an ideal – the ‘national feelings’, which authorize importing a national feeling, no matter how paradoxical this may seem». National feeling is considered «the strongest link of nationality, and most definite encouragement to the citizens». Therefore,

The books by Edmundo De Amicis will be one of the strongest elements of the work to reconstitute Italy, and from the exclusive point of view of schools, I find it one of the best made to inspire children with love of the Fatherland and the spirit of their nationality. Brazilian schools completely lack a book that, at least in its intentions, approaches this one. [...] It will spread throughout Brazilian schools; besides the pure reviving breath of kindness, virtue, morals that it will disseminate in them, I hope that my young compatriots, from Rio Grande do Sul or São Paulo, from Pará or Bahia, from the state of Rio de Janeiro or from Minas Gerais, from the South or from the North, from the East or from the West, whatever their origin or class, their race or condition, will learn in it how one loves one's country, how one admires its exploits and how one esteems those who made it great, prosperous and glorious, without being shy about it, without prejudice regarding politics and placing its venerated image above the small-minded competence of the parties²⁷.

This is how J. Veríssimo conceives man as a denial of the individual who constructs and reconstructs himself, highlighting the concept of an object that can be molded, by example and repetition²⁸.

Concomitantly to this explanation, the value of this work also lies in the fact that it touches the social emotions by educating the character, considered «the highest form of moral education that must begin by educating the first manifestations of altruism in the child». It is necessary to develop and educate in them affection, the need for tenderness, compassion for suffering, liberality

²⁶ J. Veríssimo, *Um estudo sobre De Amicis*, in *Coração. Diário de um menino*, Rio de Janeiro, Livretos editores Alves & Cia, 1894. p. 7.

²⁷ *Ibid.* p. 8.

²⁸ In 1893, the Council of Education in Public Schools of the state of Pará included the work *Coração* in the discipline of Moral Culture, which taught about home, as a light reading and example of domestic education. The periodical «A Província do Pará», of June 27, 1895 (p. 27) published the following note about the work: «perhaps no one among us does not know the charming book by Edmundo De Amicis – *Coração*, of which one of the Brazilian glories – José Veríssimo, in a preface says: «*Coração* is really a simple book, true, sober and eloquent, because it has no kind of artifice, it speaks to the sentiments and touches the organ that gave it the title, and which, according to naive popular philosophy, which is that of us all, is the seat of all our emotions». A. Pimenta, *Educação de Meninas no Orphelinato Paraense (1893-1910)*, Belém do Pará/Pará, UEP/PPGE, 2012 (Dissertação. Mestrado em Educação do Programa de Pós-graduação em Educação do Centro de Ciências Sociais da Universidade do Estado do Pará, p. 86).

and sympathy. In this task the family, in close communion with the school and society,

besides educating the will and developing the spirit of discipline, of sympathy, of solidarity, also must attack lies – which is possibly the most outstanding of our national rates –, dissimulation and fear, not only directly, but developing and stimulating courage, truth and frankness.

The fact that this article was published in a book for boys aged nine to thirteen leads one to think that they were not the only ones to read it, but also the adults – parents and teachers. This can be ascertained in the comment by Humberto de Campos, in his book *Memórias 1886-1900*, when he says that

this book was an event in Paraíba. After ‘Genoveva de Brabant’, I do not know of any other that spilled so many tears in our home, and aroused greater interest in our close circles. My companions would ask for it to show their parents. The ladies asked my mother to lend it to them²⁹.

We can see the insertion of the book and the author’s prestige in Brazilian society through information published in «Revista Pedagógica», the official journal of *Pedagogium*. In issue number 7, of April 15, 1891, it is announced that «the book *Coração*, by De Amicis, translated by João Ribeiro has been approved by the Governing Board for use in elementary schools». In the same issue, it publishes the chapter *Os Pais de Alunos* [The Students’ Parents] from the exquisite book by Edmundo De Amicis – *La novella de um maestro*. The Revista informs the reader that «we will extract some chapters that we believe will be duly appreciated by the readers». This strategy shows evidence of the success the author was having at Court known by the Brazilian public for his «interesting collaboration» with the newspaper *Jornal do Brasil*, for the «delicious» novel published *A Mestra dos Operários* [The Workmens’ Schoolmistress]³⁰.

Raul Pompeia (1863-1895) also discusses the work, in the chronicle *Lembranças da Semana* [Memories of the week], published in the newspaper «*Jornal do Comércio*» in Rio de Janeiro, on September 28, 1891. Beginning with a remark on the social injustice of the treatment given to the workmen

²⁹ H.V. Campos, *Memórias* (1ª parte-1886/1900), São Paulo, W.M. Jackson, 1954, p. 230.

³⁰ Other works by De Amicis published in Brazil: Holland (Francisco Alves, 1914); Marrocos, translated by Manuel Pinheiro Chagas (Clube do Livro, 1947, with special permission from Livraria Francisco Alves). In the Central Library at PUCRS are several copies of the Italian edition of *Cuore* (1908, 1924, 1953, 1960), of the Argentine edition – *Corazón. Diario de um niño*, translated into Spanish from the 44th Italian edition by H. Giner de los Rios, edition revised by the author and authorized for Spain and America(1910, illustrated); and other works by the author: *La Vitta Militare* (1915); *Alla Gioventù – Letture Scelti dalle opere di Edmondo De Amicis*. Antologia scolastica e famigliare per cura Dino Mantovani (1908); *Sull’Oceano* (1924). The 1960 edition of *Cuore* informs that it is of 3.065 *migliaio*.

of the world, he highlights that, with the recent translation of the work by De Amicis, «we have a nice opportunity to fulfill such a duty of justice» (p. 383). He describes the book as an «epitome of filial love, of mother's love, of respect for the schoolmasters, of ardent patriotism, of unassuming selflessness for good, this precious summary of a heart, which is Cuore»³¹.

In 1892, «Revista Pedagógica» includes the book in the list of the *Movimento bibliográfico (Didactica)* [Bibliographic Movement] for 1891. In the same issue, in the part regarding Announcements [Annuncio] it presents the *Opinião da Imprensa sobre Coração*. [Opinion of the Press regarding Coração]. If we read the excerpt of a news item published in the «Gazeta de Noticias» we are informed that this newspaper was responsible for making it popular, ever since it published «a few pages of this charming book» presented by Ramalho Ortigão.

Still in the 20th century, this book is considered a reference for Brazilian authors. Carneiro Leão, in the chapter on «Textbooks», in his work *Problems in Education*, extensively praises the work by De Amicis, which he considers the most «charming» textbook that he knows

Who does not know, among the Neolatin languages, the most beautiful of all of them: *Il Cuore* – Heart? And it would suffice to know the care and how it was elaborated to understand how serious this literature is [...]. Also, from this study a work was published for all ages and all times. Those charming pages sensitize and touch children from kindergarden to university, and the old academy director³².

He also states that the model of the book *Coração* was a milestone in schoolbook production³³, because

it is one more book for feelings and many textbooks must act more directly on the intelligence, or at least at the same time on heart and spirit; it will be pure gain if a person, with a clear, concise style, knowing how to instill in the child's mind appropriate knowledge, can impress, convince and conduct children's sensibility. I do not know a better instrument, or a readier vehicle for civic education³⁴.

³¹ R. Pompéia, *Obras*, Rio de Janeiro, MEC/FENAME, Civilização Brasileira, 1983, p. 385.

³² A. Carneiro Leão, *Problemas de Educação*, Rio de Janeiro, Livraria Castilho, 1919, pp. 221-223.

³³ We can also cite, João Simões Lopes Neto (1865-1916), who wrote *Terra Gaúcha* (manuscript) – a civic history of Rio Grande do Sul in which the first chapter *Eu no colégio* (I, at school) probably initially took as its model *Coração* by De Amicis, of whom he was a reader. E. Tambara, E. Arriada, *Bosquejo de um Ostentor do Repertório de Textos Escolares, utilizados no ensino primário e secundário no século XIX no Brasil*, Pelotas, Seiva Publicações, 2003. Katia Campelo, in her PhD thesis Project analyzes the work *Alma e Coração*, by Hygino Amanajás, published in Belém do Pará (5^a edição, 1905), whose author says that he was inspired by the work of De Amicis (K. Campelo, *Caleidoscópios na História da Leitura: análise dos livros Cuore/ Coração. Corazón; Alma e Coração*, Belo Horizonte, PPGC /UFMG, 2012. Projeto de Tese de Doutorado em Educação, Mimeo.

³⁴ Carneiro Leão, *Problemas de Educação*, cit., p. 222.

According to M. Lajolo the wide acceptance of De Amicis' book is due to

the great sympathy for such esthetic-pedagogical projects among the lettered fin-du-siècle elites [...]. The set of values endorsed and propagated by his narratives, has the clarity of orthodoxies above any suspicion; good and evil, right and wrong, adult and child, are watertight worlds which never interpenetrate³⁵.

The discourse of De Amicis's work seduced the «Brazilian elites» who believed that, by instructing the people in «morals and civics», one would achieve the regeneration of the country, an essential condition to build a modern capitalist *ethos*. Order would mostly be maintained through morals and education.

*Coração: a boy's diary*³⁶

Coração was published by «Livreiros editores» Alves & C.³⁷, in 1891. It was translated by the «distinguished literary person» João Ribeiro³⁸. According to the *Gazeta de Notícias* newspaper, João Ribeiro «did a very praiseworthy job», because of his «profound knowledge of both languages, and is currently

³⁵ M. Lajolo, *Do mundo da leitura para a leitura do mundo*, São Paulo, Ática, 1993, pp. 88, 90.

³⁶ The original Italian, in all editions, has the subtitle – *Cuore. Libro par I ragazzi*. The first Brazilian editions carry the subtitle – diary of a boy. Some 20th century editions consulted do not present the subtitles. The Argentine edition has the subtitle: *Corazón. Diálogo de um niño* (1910).

³⁷ It is interesting to see the comments by the Folhetim of *Jornal do Comercio* regarding the Publisher: «as booksellers and as publishers, Messrs. Alves & C, are scrupulous in their business as in practicing a serious duty. Their shelves diffusing books on education and teaching have nothing to shame and cause them remorse (one can advertise this which is publicity for their seriousness). Their editions, are especially useful because they make the most honest and lucid choices. And speaking of their editions it should be said that they pay for them». «*Revista Pedagógica*», vol. 3, nn. 16-17, feb. 1892.

³⁸ João Ribeiro was born in Laranjeiras, Sergipe, on June 24, 1860, and there he studied Humanities. In 1881 he came to Rio de Janeiro intending to enroll in one of our academies, but he dedicated himself to teaching as a reader at colégio Almeida Martins, enthusiastically working with linguistics in which he became famous. He then graduated, in 1883, with a Bachelor of Social Sciences at Faculdade Livre de Direito in the Federal Capital. He was a functionary of the National Library from where, taking the appropriate competitive exam, he became a teacher at the Ginásio Nacional. He cultivated letters, was a poet and wrote: *Idyllos modernos*, 1882; *Dias de sol*, 1884; *Avena e Cythara*, 1886; *Estudos philologicos*, 1884; *Morphologia e collocação dos pronomes*, 1886; *Exames de portuguez*, 1887; *Grammatica portugueza da infância*, 1890; *Grammatica portugueza elementar: curso médio*, 1888; *Grammatica portugueza: curso superior*, 1888; *Dicionario grammatical*, 1889; *A instrução publica*, 1890; he translated *Coração*, by Edmundo De Amicis, 1891; *Historia antiga*, 1892; *Ensino cívico*; *Discurso proferido*, 1893; *História do Brasil*, 1900 (Blake, 1883-1902, pp. 34-35). João Ribeiro, in 1917, said that he had had 150 printings of his textbooks, around one million copies, published by Livraria Francisco Alves. L. Hallewell, *O Livro no Brasil*, São Paulo, EDUSP, 1985, p. 211. About his works on History of Brazil, see: A. Gasparello. *Construtores de identidades: a pedagogia da não nos livros didáticos brasileiros*, São Paulo, Iglu, 2004.

the best master of our language in Brazil, with the delicate temperament of an artist. His translation is incomparably superior to those that preceded it, and it is the only one authorized by the illustrious author, both in Portugal and in Brazil»³⁹. The book was being sold for 1\$500 (mil e quinhentos réis).

The booksellers-publishers received the exclusive rights to publication from the author himself on October 16, 1890, and the author received 350 francs for this concession, as recorded in the Book of Contracts

About the booksellers-publishers, whose practice it was to pay for copyrights, it is important to record the words of Raul Pompéia, published in «Jornal do Comércio», on September 28, 1891.

Much to the contrary, as booksellers-publishers, Msrs Alves & C. are very scrupulous in their business, regarding it as fulfilling a serious duty. [...] Their editions, especially, undergo the care of a very honest and lucid choice. And speaking of their editions, it should be underscored that they pay for it. [...] We do not know how much João Ribeiro profited by his very elegant and conscientious translation of *De Amicis*. But one can say that the zealous publishers honored the precedents of their firm, by having it translated (with the author's permission) for Brazilian children⁴⁰.

The authorized Brazilian translation was done based on the 101st Italian edition (1888/89), as indicated on the title page and confirmed by José Veríssimo (1892). In 1925, João Ribeiro published a caveat (*Advertência*)⁴¹, in which he points out that the translation has been revised, and he named it as Brazilian, «made for Brazil, exclusively, which is indeed the purpose of all Brazilian books, the now revised translation offers a few useful and necessary corrections». This caveat is also present in the 1954 copy. Paschoal Leme points out that the copy he read was «carefully corrected according to the Italian 854th (!) edition»⁴².

Besides the translation by João Ribeiro, there are other editions of this work. For instance, the one published by Teixeira & Irmão, in 1891, translated by Valentim Magalhães⁴³. This translation was also published by Empresa Literária Universal (Lisbon/Portugal), dated 1938. The Livraria Universal of Echenique Irmãos & C, in Pelotas (RS), published *Coração* (the 4th edition is from 1907, with a translation of the 100th Italian edition). This edition is a pirated copy of the Francisco Alves edition, and does not mention the translator⁴⁴.

³⁹ «Revista Pedagógica», vol. 3, nn. 16-17, feb. 1892.

⁴⁰ Pompéia, *Obras*, cit. pp. 384-85.

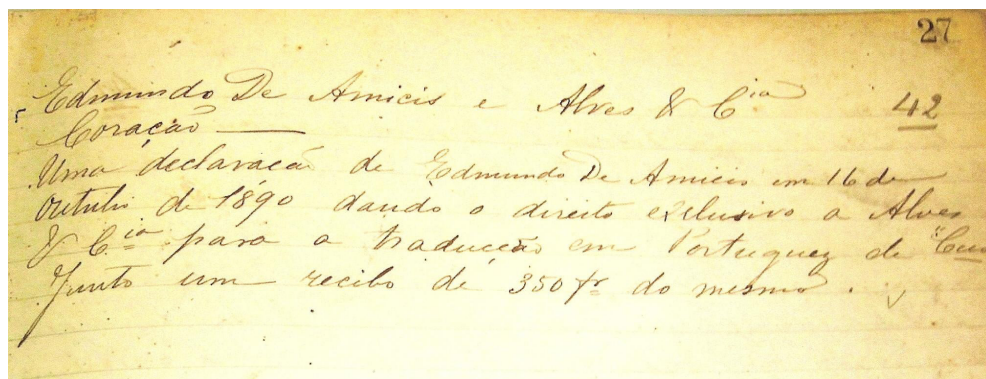
⁴¹ Beginning with this edition, João Ribeiro's caveat will be reproduced in all the editions of that work.

⁴² These data are probably presented in the 1927 edition. The Italian editions consulted did not show the number of editions, but the number printed in thousands of copies: 1908 – 415^a *migliaio*; 1924 – 1314^a *migliaio*; 1953 -?; 1960 – 3065^a *migliaio*. In Italy the book reached the mark of one million copies in 1920.

⁴³ V. Magalhães, *Prefácio*, in E. De Amicis, *Coração*, tradução Valentim Magalhães, São Paulo, Teixeira & Irmão, 1891.

⁴⁴ For L. Hallewell in Brazil, until 1912, there was no international protection of copyrights, and

Pic. 3. Caption: Book of Contracts of the Publishers Alves 7 C. Collection LIHED/UFF



Source: Book of Contracts of the Publishers, Rio de Janeiro, 1890 (LIHED / UFF)

«A Reforma», a Porto Alegre/RS newspaper, on July 1891, announces this work *Coração*, a book of civil and moral education, with a Brazilian edition by Livraria Americana, and also does not mention the translator. In the publicity it points out that in Italy there were already more than fifty editions of the book.

The edition that we are putting on sale today is carefully printed, with an accurate revision, a special point in school books. The translation was entrusted to a master and it suffices to take a brief look at it to judge its merit and superiority to all those published so far.

L. Arroyo, talking about the translations of the book – Brazilian and Portuguese – provides further information, transcribing them from the *Livro Diário para 1901* [Diary Book for 1901] of Livraria Laemmert:

If one takes a good look at this curious problem, we will note that, strictly speaking there were three translations, besides an adaptation of the book for Brazilian schools. There is a translation, whose author's name could not be ascertained. This one is mentioned in the book by Adélia Pinto (*Um Livro sem título*), who was born in 1882. The book by Edmundo De Amicis was read by the girl when she was about six years old, in other words around 1888. João Ribeiro's translation was launched in 1891, and the 1901 catalogues recorded the second edition of 'Coração', translated in Portugal by Alexandre Sarsfield, who also authored an adaptation (*Leituras para meus filhos*) to which we refer above⁴⁵.

In 1968, it began to be published by Tecnoprint/Livro de Ouro with an adaptation by Osmar Barbosa (155 pages and illustrations). The copies consulted were: from Livraria Francisco Alves – the 44th edition – carefully

therefore it was possible to publish clandestine editions (Hallewell, *O livro no Brasil*, cit., p. 244).

⁴⁵ L. Arroyo. *Literatura Infanto-Juvenil*, São Paulo, Melhoramentos, 1968, p. 107.

revised in 1949; the 46th edition, of 1954 (326 pages); from Editora Hemus, with a translation by João Amêndola, done in 1997 (230 pages and illustrations)⁴⁶; from Cosac&Naif, in 2011.

The Francisco Alves editions are not illustrated, different from the Italian editions. The first illustrated Italian edition of the book was published in 1892, with pictures by Ferraguti, Nardi and Sartorio⁴⁷. In the Brazilian edition, only the cover shows an engraving which reproduces the picture by Nardi, in the last story *Adeus (Adieu)*, which shows Garrone kissing Enrico, on the last day of school

Among the many editions of the book, Livraria Francisco Alves did not make many changes in the cover, only modifying the colors (green, brown). We found one copy whose cover is drawn and colored⁴⁸.

In the first Brazilian edition, the translator includes a Caveat (Advertência), in which he transcribes De Amicis' preface for the 101st Italian edition:

This book is particularly dedicated to elementary school children, children aged 9 to 13, and could be called 'story of a school year, written by the third-year pupil of a municipal school in Italy'. When I say, written by a third-year pupil, I do not mean that he wrote it as is printed. He took note, daily, in a copybook, of what he saw, felt and thought in school and outside it; at, at the end of the year his father used the notes to organize these pages, by not altering the thoughts and preserving his son's words as much as possible. The son, 4 years later, already in junior high school, reread the manuscript, added a few things on his own, using his still fresh memory of people and things. Now read this book; it will give you pleasure, and do you good, I hope⁴⁹.

For José Veríssimo the book is successful because:

It speaks to the child, to schoolchildren, about themselves, their comrades and classmates, their teachers, their parents, their games and toys, their lessons, their punishments and their prizes, their school life, ultimately with all scenes and all episodes [...]; being an original

⁴⁶ In the advertisement of Editora Hemus, the book *Coração. Diário de um aluno*, still available in the Catalogue (R\$25,00), the following is written «a masterpiece of world literature, *Coração* reaches deep into people's souls, it can touch the most indifferent reader. It is not a common book, it is not pedantic like other books; it is a profoundly marvellous and unforgettable work. It might be said to have an essential virtue which makes of it the literature for several generations, and almost one century after in appeared, it still speaks to the soul of all who have higher sentiments. Dedicated to boys aged nine to thirteen years, it makes all the other weep, also like children. Illustrated, complete and not adapted». <<http://www.hemus.com.br/livro.asp?codigo=11146>> (last access: 28.01.2016).

⁴⁷ The French edition of 2001 shows these illustrations, fourteen pictures in black and white. Outstanding are the pictures of Count Cavour and Giuseppe Mazzini.

⁴⁸ The problem is that many editions of this book are in bound form in libraries, without the original cover, only the inside cover.

⁴⁹ This explanation by the author is found in all the Italian editions, which does not happen in the Brazilian 20th century editions consulted.

book which in no way looks like common textbooks; it does not have their pedantic and doctrinaire aspect, nor the sentimental, affected and futile air with which others want to hide, under an appearance of simplicity, their incapacity to do something simple and good. It is really an unassuming, true, sober and eloquent book, because without any kind of artifice, it speaks to sentiments and touches the heart that gave it its title, the heart which according to the naïve popular philosophy, which is that of us all, is the seat of all our emotions⁵⁰.

Coração, as the very name suggests, intended to educate the heart, through the heart. De Amicis consider that in this «human organ» reside the feelings, the emotions, the conscience which can be influenced and taught. «The basic concept of the book is to educate the mind and heart of the young with examples of virtue, selflessness and courage»⁵¹. From this perspective, virtues and moral messages are interwoven throughout the text, written in the form of a third-year student's "diary", in which each "story" is a life lesson. The reader is constantly remembered as a «boy that is all heart, a young man of heart and honor», whom «God endowed with great gifts, all you have to do is make good use of them», taking as example the character-student Enrico⁵². In the story of «A well-deserved medal», the school inspector says to the student: «I am not bestowing (this medal) only for your intelligence and good-will, I'm giving it to your heart, your courage, your character as a good and obedient son»⁵³.

The book is a portrait of everyday life at a public school for boys, in Italy, between 1881 and 1882, the Post-Unification period. The contents are divided among the months of the school year, beginning in October and ending in July. The author intersperses the stories of everyday happenings – at school and in the family, with letters from the parents and monthly stories⁵⁴ – aiming to strengthen the civic spirit or the moral virtues, appealing to the reader's sentimentalism and to an optimism that is far from reality. In the stories – The Little Patriot of Padua, The Little Vidette of Lombardy, The Little Florentine Scribe, The Sardinian Drummer Boy, Tata' Nurse, Romagnolo Blood, Civic Value, From the Appenines to the Andes, Shipwreck – the author's intention is to make the reader feel that they are a "character" in the text, identifying themselves with the characters and with the everyday events narrated, for a better grasp of the enhanced moral and «civic messages».

Throughout the book, the boy-reader is faced with opposites, namely, how they should or not be, act and think. Prescribing the virtues to be adopted in

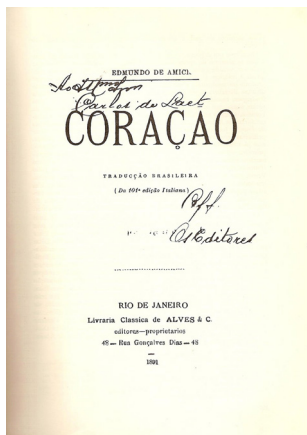
⁵⁰ J. Veríssimo, *A Educação Nacional*, cit., p. 7.

⁵¹ *Ibid.* p. 7.

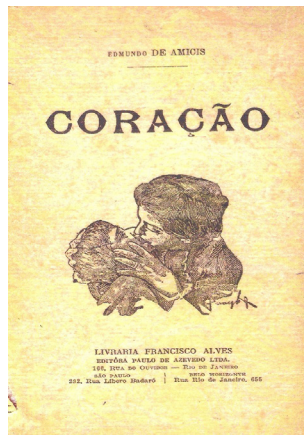
⁵² Enrico could be compared, nowadays, with the character Harry Potter: heroes who are undergoing a process of social formation and insertion. For Bakhtin, «the life of the hero and their character become a variable magnitude», and their example aims as the *formation* (transformation) of man, of the reader. The education/formation novel is characterized by presenting the hero/character in a process of learning/formation» (Bakhtin, *Estética da criação verbal*, cit., p. 235.

⁵³ E. De Amicis, *Coração*, Rio de Janeiro, Livraria Francisco Alves, 1954 (46^o edição), p. 117.

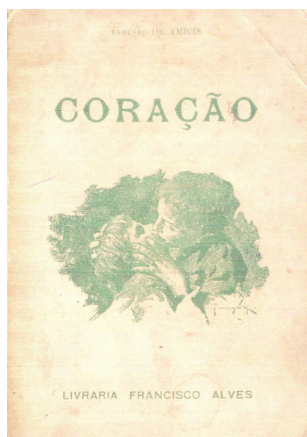
⁵⁴ In the book content, the monthly stories are highlighted with capital letters.



Pic. 4. Caption: Inside cover of the 1891 edition. Collection of LIHED/UFF. Source: Edmondo de Amicis, *Coração*, Rio de Janeiro, Livraria Clássica de Alves, 1891, inside cover.



Pic. 5. Caption: Cover of *Coração* 1949 (44^a ed.). Source: Edmondo de Amicis, *Coração*, Rio de Janeiro, Livraria Francisco Alves, 1949, cover.



Pic. 6. Caption: Cover of *Coração* 1954 (46^a ed.). Source: Edmondo de Amicis, *Coração*, Rio de Janeiro, Livraria Francisco Alves, 1954, cover.



Pic. 7. Caption: Cover of the 1959 edition (48^a ed.). Source: Edmondo de Amicis, *Coração*, Rio de Janeiro, Livraria Francisco Alves, 1959, cover.

personal/social life, the author refers to those condemned by society. Thus, to value the virtues of love of others, kindness, courtesy, resignation, piousness, respect, gratitude, solidarity, compassion, love of Fatherland, love of work, seeking happiness, it condemns the attitudes of envy, cowardice, vanity, usury, conceit, impatience, ire, insolence, sloth, vices, pride. Thematic texts reinforce the learning of these virtues such as: «A Generous Deed»; «Generosity»; «Vanity»; «Will»; «Gratitude»; «Envy»; «Hope»; «Sacrifice»; «Love of Country»; «Good Intentions»; «Pride».

Civic attitudes and values are presented through different prescriptive premises: «he who respects the flag as a child will know how to defend it when grown up»; letters from the father (*The Love of Country*); monthly stories (*The Sardinian Drummer Boy*, *The Little Vidette of Lombardy*, *The Little Patriot of Pádua*, *Civic Value*), and school topics (*The Funeral of Vittorio Emmanuele*, *The Soldiers*, *The Calabrese Boy*, *Count Cavour*, *King Humberto*, *Giuseppe Mazzini*, *Garibaldi*, *The Army*)⁵⁵.

Work is recurrently exalted:

Work does not dirty. You must say: on the clothes are the marks of work; courage, to work with all one's soul and all one's nerves; to the work that will make repose sweet, amusements pleasant, dinner joyful; to the work that will bring me back the good smile of my teacher and the blessed kiss of my father⁵⁶.

In the text *The Victims of Work*, the author writes an exaltatory analogy of workmen as soldiers in battle, and gives the reader a lesson on education of social class:

See the men of the upper classes are the officers and the workmen are the soldiers of labor, but as in society, in the army the soldier is not less noble than the officer, because nobility lies in work and not in earnings, in value and in degree⁵⁷.

In the story *The Distribution of Prizes to the Workmen*, students of the professional evening schools, the author conveys an idealistic view of society that minimizes conflicts, injustices, social differences, and reinforces the intention to enhance the value of work:

⁵⁵ Pécout considers the book an «optimistic picture of the Italian army: its educational mission in peacetime and in wartime, the interclass and solidary image it offers national society and the parallel between military and patriotic values on the one hand, and individual and family values on the other». G. Pécout, *Le Livre Coeur: éducation, culture et nation dans l'Italie libérale*, in E. Amicis, *Le Livre Cœur*, Paris, Rue d'Ulm Ed, 2001. p. 367.

⁵⁶ De Amicis, *Coração*, cit., p. 28.

⁵⁷ *Ibid.*, p. 125.

I felt something inexpressible in my heart, as a great affection and a great respect, when I thought about how much these prizes had cost all the workmen, heads of their families, full of worries, how much fatigue added to their fatigue, how many hours stolen from their sleep, that they so much need, and how much effort of an intelligence that is not accustomed to studying and the thick work-hardened hands⁵⁸.

Having the school and a school year as backdrop, their value is recurrently praised, as well as that of the teacher, of studying, of the effort that allows «rising in position thanks to study and deprivations», in several chapters – *The first day of school*, *Our schoolmaster*, *To my old schoolmistress*, *The School*, *My brother's schoolmistress*, *The Director*, *The First in Class*, *The schoolmistresses*, *The substitute schoolmaster*, *The sick schoolmaster*, *The evening schools*, *My father's schoolmaster*, *To my dead schoolmistress*, *Exams*, *The last exam*.

Schoolmasters are praised because their social role in the Italian Unification process is acknowledged:

Love thy schoolmaster, because he belongs to that great family of fifty thousand elementary schoolmasters; spread out through all of Italy, who are as the intellectual fathers of millions of boys who grow up with you, the ill distinguished and ill rewarded workmen who prepare for our country, a better people than we have now⁵⁹.

The text *Count Cavour* reproduces his words on his deathbed, which makes them more dramatic:

Educate children and youths [...] govern with liberty. The social difference is signaled by the studies, naturalizing it: once you have finished the fourth grade you will go to high school, they will become workmen. When you are at University or in Senior High School, you will seek them out in their stores or workshops, and you will feel great pleasure in meeting your childhood comrades – men at work⁶⁰.

The book constantly refers to the innovations implemented together with the Republic of Italy, such as: expanding public schools; evening schools for workmen; special care for the blind and deaf-dumb; children's homes. The intention is to exalt progress and the need for order that permeate all reading: «the (school) movement is progress, hope, the glory of the world». In this action, the author deals with the excluded from society: «the poor, the convicts, children with rickets, a deaf-dumb woman, blind boys, the children's home», showing social inequalities in a naturalized way, since it perceives the world as divided into two: the poor and the rich.

Heart expresses morals that are valid for all, morals that exalt sacrifice and work, respect for the social hierarchy and human brotherliness. Because of the exaltation of patriotic and social value, the abundance of good sentiment,

⁵⁸ *Ibid.*, p. 180.

⁵⁹ *Ibid.*, p. 71.

⁶⁰ *Ibid.*, p. 197.

the paternalistic humanitarian spirit, reading it arouses ideal sentiments for an idealized society.

Memories of readings

For R. Chartier, “«orks – even the great ones – or especially the great ones – do not have a static, universal, fixed meaning. They have plural and mobile meanings that are constructed in finding a proposal for reception. The sentiments attributed to their forms and motives depend on the competencies or on the expectations of the different publics that appropriate them. Certainly, those who create them, the powers or the experts always want to establish a meaning and enounce the correct interpretation that must impose limits on reading (or on looking). However the reception invents, displaces and distorts»⁶¹.

Intending to perceive the adoption and appropriation⁶² of this work, we searched in memoirs for clues that would allow us to analyze the meaning of their reading – the process of building a meaning⁶³ based on their inclusion in the memories that marked the first years at school. In other words, the power of the book’s content to influence the reader, the acceptance of facts and situations represented⁶⁴.

The fact of appealing to the readers’ feelings and affectivity, using the story of episodes very dramatically to impress them, seems important to look at the impact caused on illustrious readers, in other words, «considering a text, historically a meaning is produced, and a meaning constructed with a differentiation»⁶⁵.

For Lajolo, the history of a people’s literature is «the history of the readings of the books that are part of the body of this literature, [...] in a concept of reading which sees it at the same time as an institution and a collective practice,

⁶¹ R. Chartier, *La historia o la lectura del tempo*, Barcelona, Gedisa, 2007, p. 105.

⁶² «Thinking about cultural appropriations also allows one not to consider completely effective and radically aculturating the texts or words that intend to mold thinking and behavior. The practices that take them over always create uses or representations that in no way can be reduced to the will of those who produce discourses and norms. The act of reading can in no way be annulled in the text itself, nor in the behaviors experienced in the interdictions and precepts that intend to regulate them. Messages and models are always accepted through systems, deviations, unique reuses that are the essential object of cultural history». Chartier, *A História Cultural: entre práticas e representações*, cit., p. 137.

⁶³ For Bourdieu «a book changes because it does not change while the world changes, while its way of reading changes» *ibid.*, p. 131.

⁶⁴ This was partly consulted in J.S. de Alencar, *Flagrantes da Vida Escolar Brasileira, final do século XIX e início do século XX*, São Paulo, USP/SP, 1996 (Dissertação de Mestrado em Educação no Programa de Pós-Graduação em Educação da Universidade de São Paulo).

⁶⁵ Chartier, *A História Cultural: entre práticas e representações*, cit., p. 131.

it seems that one can privilege reflection on nature and the social trajectory of reading»⁶⁶.

Manuel Bandeira (1886-1968), in his book of memoirs under the title *Itinerários de Pasárgada* [Itineraries of Pasagardae], recalls reading Heart as follows:

Here I must evoke the hours of intense emotion, the first ever provoked by a book read with my own eyes, and it was this book, *Cuore* by De Amicis, in the translation by João Ribeiro. I was a half-boarder at the School of Virgínio Marques Carneiro Leão, on Matriz Street. After a certain time of day, the non-boarders returned home and I remained alone in the large hall at the back of the building. *Coração* was the reading book adopted by my class. To me, however, it was not a book to study. It was the door into a world, not to get away, as in 'Viagem à roda do mundo numa casquinha de nozes' [Trip around world in a nutshell], but of a feeling mixed with the terrifying intuition of the sadnesses and wickednesses of life⁶⁷.

Humberto de Campos (1886-1934), in *Memórias 1886-1900*, presents his memories of the work by De Amicis:

It was around this time (1896), if I well remember, that my uncle Antoninho sent the family, from Belém, besides other precious things, a dozen tins of condensed milk, and to me a soft cover copy of *Il Cuore* by Edmundo D'Amicis, in the Portuguese language translation by João Ribeiro. This book was an event in Paraiba. After 'Genevieve de Brabant', I do not know of any other that spilled so many tears in our home and aroused greater interest in our close circles. My companions would ask me for it, to show their parents. The ladies asked my mother to lend it to them⁶⁸.

Paschoal Leme (1904-1997), in his *Memórias* (1988), in the chapter of *Leituras e Livros* [Readings and Books], provides a significant report on the work:

Reading in general began in elementary school, through the books read in class which, in my time included among the authors, great names of the national and foreign literature. From this period I have many vivid memories of that extraordinary book which is *Coração* by Edmundo De Amicis, a master piece of sensibility which charmed many generations of boys here and worldwide. Translated by João Ribeiro and carefully corrected according to the 854th Italian edition (!), printed on cheap newsprint, and published by Livraria Francisco Alves, thus with a very modest presentation. In these stories we faced those very simple scenes of school life, portraying precisely the situations with which we were familiar, with teachers, some of them extremely dedicated to the point of sacrifice and kindness, others bitter, carrying their personal problems, like the men and women they were; classmates, some of the exceptional, capable of great actions, studious, diligent, other rude, cowardly, impertinent and even brutal, and yet others simply wags, playful, always ready for mischief; a Garrone, a Derossi, a Carlos Novis or the heartless Franti. There were also the monthly

⁶⁶ M. Lajolo, *Usos e abusos da literatura na Escola. Bilac e a literatura escolar na República Velha*, Rio de Janeiro, Globo, 1982. p. 106.

⁶⁷ M. Bandeira, *Itinerários de Pasárgada*, Rio de Janeiro, Nova Fronteira, 1984, p. 12.

⁶⁸ Alencar, *Flagrantes da Vida Escolar Brasileira – final do século XIX e início do século XX*, cit., p. 50.

stories which moved us to tears: The little patriot from Padua, The chimney sweep, The small vidette of Lombardy, The small Florentine scribe, From the Appenines to the Andes, Romagnolo Blood and so many others. And there were also those letters, signed by Your Father or Your Mother, addressed to the protagonist and narrator of the book, middle class Enrico, letters that always touched us deeply with their advice, their reprimands, their admonitions, but always full of love and tenderness for the son who was preparing for life at school⁶⁹.

Continuing his analysis, Paschoal Leme transcribes the letter *The workmen friends*, with the following reflection:

It would not be too much, in these Memoirs, to transcribe one of these letters here [...], revealing the character of this book, unique worldwide, today completely forgotten and out of the reach of our schoolchildren, whose spiritual sustenance, unfortunately, appears to be limited to the comics, which have nothing to do with our culture, and whose subjects are almost always violence, crime, indifference⁷⁰.

Pedro Nava (1903), in *Balão Cativo – Memórias/2*, discussing his reading, highlights the «melodramatic stories» his paternal grandmother sent him with the following dedication. «Pedro, since I can't send you mine, I'm sending that of Edmundo De Amicis. Yours, Granny». Below he comments on his remembrances of the book:

It was Heart. Today I have the impression that the book, with a tearjerking moralism, is a kind of Italian Stories of the Fatherland. But in those days I was deeply moved. I suffered with those symbolic children and teachers, those emblematic mothers and fathers. It was only later that I realized that they have something of the intentionality and innocent schematization that Roland de Cavaljo discovered in the animals of La Fontaine. Except that the latter laugh, invectivate, sing and fight, while Edmundo De Amicis' fauna only cry and take pleasure in their sorrow⁷¹.

Raimundo Nonato da Silva (1907), in *Memórias de um Retirante* (1957), when he points out that he learned to read and write at the age of thirteen, tells of his entry into the world of literature as follows:

I bought a second hand book [...]. The book was an elementary edition of the famous Grammar of João Ribeiro, and the first lesson said the following: Grammar is the art that teaches how to write and talk the Portuguese language correctly. The day I took up the compendium, I immediately got this unfortunate concept in my mind, certain that with this small notion I was entering new paths of knowledge. [...] Soon afterwards, another important book came along: *Coração* by Edmundo De Amicis, with his beautiful lessons and the monthly stories, such as 'Shipwreck' and 'From the Appenines to the Andes'⁷².

⁶⁹ P. Lemme, *Memórias/1*, São Paulo, Cortez; Brasília: INEP, 1988. p. 142.

⁷⁰ *Ibid.*, p. 143.

⁷¹ P. Nava, *Balão Cativo. Memórias/2*, Rio de Janeiro, J. Olympio, 1973. p. 367.

⁷² de Alencar, *Flagrantes da Vida Escolar Brasileira – final do século XIX e início do século XX*, cit., p. 215.

Paulo Mendes Campos (1922), in his remembrances of his first reading, also says, that «it was nice to discover *Coração* by D'Amicis»⁷³.

Coração is also present in the novel *Doidinho* (1933), by José Lins do Rego (1901-1957), which allows to one to deduce that the author read it and considered it of significant value, since he included it in his work. Carlinhos, the protagonist, recalls: «the world to which I would like to have access, to escape the oppressive atmosphere of Professor Maciel's school», which was portrayed in the work by De Amicis:

It would be a great victory for me to abandon those yellow copybooks. But my great ideal as a student was in *Coração*. [...] Everything seemed to me passages of an admirable novel. And how different that school was from that of Professor Maciel! They distributed prizes, the teachers talked softly, there were no paddles to hit the hands. Our school did not look like the schools in Italy. [...] The entire delicious book called me into its pages. [...] The *Seleta Classica* was full «of discourses, of verses». But «*Coração* made our boyish sensibilities quiver», we were interested in those conflicts that were ours. This book so full of love for Italy made me love those that I did not know, strangers, dirty boys because they did not have clean clothes, the heroes of those stories. My childhood without Jules Verne and his tin soldiers imagined its heroes as being like those of *Coração*, their great men, those who died for their country, and those who gave their life for their parents⁷⁴.

The book *Maria Ângela – Páginas de vida escolar* (1924) by Ataliba de Oliveira, approved for use in schools in the state of São Paulo, points out that Schoolmistress Maria Ângela, on their first day at school, brought «old books», an old primer by João de Deus, yellowed with time: a *Cartilha da Infância* (Primer of Childhood) by Thomas Gallardo. «Attilio Mimosi, the son of a Roman couple, brought a brand new *Il Cuore*, by De Amicis, well protected in its brown paper cover»⁷⁵.

The story by Marcos Rey – *Coração Roubado* [Stolen Heart] – tells of the disappearance of the book by Edmundo De Amicis, which he received from his father in the last year of elementary school⁷⁶. The author read the work in his youth⁷⁷.

Presented as a book for boys, they were not the only readers of *Coração*. Women also were marked by reading it – Laura Octávio (1894-1996), Adélia Pinto (1879-?)⁷⁸, Maria Madalena Antunes Pereira⁷⁹ (1880-1959), Zélia Gattai

⁷³ Lajolo, Zilberman, *A Formação da Leitura no Brasil*, cit., p. 213.

⁷⁴ J. L. Rego, *Doidinho*, Rio de Janeiro, José de Olympio, 1994. p. 125.

⁷⁵ A. Oliveira, *Maria Ângela. Páginas de vida escolar*, São Paulo, 1924. p. 24.

⁷⁶ This short story was adopted for the Entrance Exam to the Preparatory School for Brazilian Army Cadets, in the Portuguese exam, in 1999.

⁷⁷ E. Steen, *Viver e escrever* 3, Porto Alegre, L&PM, 2008. p. 59.

⁷⁸ «I like reading my story books, every day rereading a few pages of *Coração*, by Amicis, meditating». A. Pinto, *Um livro sem título. Memórias de uma provinciana*, Rio de Janeiro, Pongetti, 1962, p. 51.

⁷⁹ *Casa Paterna* [Father's House] was the first sonnet «I read in my life and *Coração*, by De Amicis, the first book. If the baptism of the impression remains indelible, my spirit, receiving a

(1916) mention it in their autobiographies/memoirs and diaries⁸⁰. Valentim Magalhães, in the preface of *Coração* (1891), addresses the female public and recommends that women

read Heart, my ladies, read it, you'll find it the most agreeable book in form and most humanely divine, ultimately, in ideas, doctrines, that you can find. Read it and re-read it, and then, in the evening, every evening, read a page to your children, and do not let your husband retire to his study, or his bedroom without asking for the collaboration of his knowledge and understanding to have complete intelligence of what De Amicis intends in this or that step of his book, and for the most perfect implementation of your educational plans. It was he who [...] managed to write a treatise on education, without making it an actually pedagogical work, writing the book that he felt was necessary for mothers who, in the solitude of their bedchambers, waiting for their husbands or seeing them sleep, subjugated by fatigue, think about their maternity, which is about to blossom in fruits of love and daydream about their darling children, who will soon be born [...] ⁸¹.

In these memoirs one perceives a marked exaltation from reading *Coração*, giving value to the lessons of the world that established a significant dialogue with the Brazilian readers, through the infallible paths of desire, sentiment and emotion, towards one of the noblest ideals of fraternity and human solidarity.

Monteiro Lobato, in a letter to Godofredo Rangel, written in Santos and dated June 30, 1915, expresses his feelings about DeAmicis' success and the pleasure of reading his works:

I am reading Edmundo d'Amicis, Your Honor, this man who is a peerless enchanter (I say enchanter using the meaning it has in magic). Do you know how many editions Cuore has already had: Four hundred and fifty-one! *Vita Militare* had 93... *Idioma Gentile*, 46... *Constantinopla*, 30. What explains this? The seduction, the magic of this man. It is like bird lime. One begins to read him and is caught. Magic, Magic. There is Black Magic, White Magic – and Literary Magic. D'Amicis is a great Literary Magus⁸².

In another letter, dated September 8, 1916, he comments on the poor children's literature in Brazil and talks about the book:

baptism of rhymes and styles, was forever impregnated with the odors of art and poetry». M. Pereira, O. Oiteiro, *Memória de uma Sinhá Moça*, Natal, A.S. Livros, 2003, p. 214.

⁸⁰ Cabanel points out that there were versions of this book for women: *Verso la luce*, by Lydia Torreta (1913); *Allieve di Quarta. Il Cuore delle bambine*, by Ida (Haydée) Finzi (1922). P. Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux* (XIX et XX siècle), Paris, Belin, 2007, p. 560.

⁸¹ Silva, *Em alto-mar: narrativa de uma travessia*, cit., pp. 11-12.

⁸² M. Lobato, *A Barca de CLEYRE*, São Paulo, Brasiliense, 1946. p. 35.

What can our children read? I don't see anything. Such fables would be a beginning of the literature that we lack. Since I have a certain talent at selling a pig in a poke, in other words, a skill as talent, I have been thinking of beginning it. Our children's literature is so poor and so idiotic, that I can't find anything for my children to begin with. Later I will only be able to give them *Coração* by D'Amicis – a book that tends to make them into small Italians⁸³.

Dora Lice, in her autobiographic book – *O Calvário de uma Professora* (1927) [A Schoolmistresses Calvary] – vehemently criticizes adopting the book by De Amicis, in the São Paulo school of her time, when she tells about a class that she is attending. She highlights both the ills of the foreignness of the book content, and feelings of animosity against foreigners descending from immigrants in Brazil:

The teacher was reading a story by De Amicis enthusiastically and with some expression, for the class to reproduce. This story described in strong terms the patriotism of a small Italian. It explained the fact so vividly that the class throbbed with Italian patriotism, already loving the beautiful, brave Italy, and despising the rustic and small-minded Brazil that was presented to it. Obligated to hear so many revolting things, Hermengard felt bad. [...] On her way home, she thought sadly: 'for this, the complete denationalization of Brazilian children, the government is paying foreign teachers!'⁸⁴.

The students magazine at Escola Normal in São Carlos (São Paulo) – Excelsior (1911-1916), in 1913, promotes a «Literary Competition», with the theme «production of a children's story imitating Edmundo De Amicis in Heart», and the winner could choose as a prize the book by an author, among the following: *Mulheres e Crianças* (Women and Children), by Maria Amalia Vaz de Carvalho; José de Alencar or Júlia Lopes de Almeida⁸⁵.

Orestes de O. Guimarães in his report on the adoption of books for teaching, presented to the Governor of the State of Santa Catarina in 1911, recommended the book by De Amicis for the inspectors' library, attached to the Board of Public Education. (Diretoria de Instrução Pública). Also Lourenço Filho, in the Reform of Public Education of Ceará (1923) and in the courses he taught at the Escola Normal (1923), recommended acquiring the book to be read in elementary school⁸⁶.

In the books recommended for Brazilian youth by Domingos Perdigão, especially in Maranhão in the 1920s, in *O que deve se ler. Vade-Mecum*

⁸³ *Ibid.*, p. 104.

⁸⁴ D. Lice. *O Calvário de uma Professora*, São Paulo, s/ed, 1927.

⁸⁵ E.C. da Silva, *A Configuração do habitus profissional para o aluno-mestre: a Escola Normal Secundária de São Carlos (1911-1923)*, Marília/SP, UNESP/Campus de Marília/FFC, 2009, dissertação (Mestrado em Educação), p. 96.

⁸⁶ About this, see M. Bastos, J. Cavalcanti (edd.), *O Curso de Lourenço Filho na Escola Normal do Ceará (1922-1923). As normalistas e a pedagogia da Escola Nova*, Campinas/São Paulo, Editora Alínea, 2009; Id. (edd.), *Album com Pequenos Trabalhos de Pedagogia. As normalistas da Escola Normal do Ceará e a pedagogia da Escola Nova (1923)*, Santa Maria, ed. Unifra, 2010 (CdRom).

bibliográfico [What one should read. Bibliographical vade-mecum] (1922/23)⁸⁷, recommends the «delicate and sentimental book ‘Coração’ by Edmundo D’Amicis».

The periodical press for education⁸⁸ and Catholic culture also seems to use excerpts from De Amicis’ book, as we can observe in the magazine «Auxilium», the mouth piece of Colégio Santa Inês in São Paulo (Instituto Educacional das Filhas de Maria Auxiliadora), in April 1951, guiding the reading practices of its young readers⁸⁹.

In the *Compêndio de Literatura Infantil* for the third year of the Escola Normal, written by Bárbara Vasconcelos Carvalho (1959), it is recommended that the book «should be read by all adolescents», since «it is full of tenderness and beautiful sentiments»⁹⁰.

In the study *O Aprendizado da Ordem* [The learning of order]⁹¹ which analyzes texts adopted in the discipline of «Communication and Expression», using the textbooks of the 3rd and 4th grade of elementary school, in 1975, the author underscores texts in the book by De Amicis: *The first day at school. Our teacher*. This shows that excerpts of the book are still present in the daily life of students in Brazilian schools, when the book is no longer adoted for reading⁹².

Sérgio Brito, a journalist from Maranhão, in his book *Confissões, críticas e conselhos de um Rato de Biblioteca* [Confessions, critiques and advice of a bookworm], dedicates a chapter to the book *Coração*⁹³, that he was given by an uncle, in 1949, in which he reveals that reading it still touches him today. On rereading it, almost six decades later, he says:

⁸⁷ About this, see M. Bastos, T. Ermel, *As prescrições de leitura para a juventude de Domingos Perdigão. O que se deve ler. Vade-Mecum bibliográfico (1922/1923)*, «Cadernos de Pesquisa em Educação do PPGE-UFES», n. 33, jan/jun. 2011, pp. 417-449.

⁸⁸ In 1952 the Department of Education of Rio Grande do Sul also listed the book as reading for the 5th grade of elementary school («Revista do Ensino», n. 5, abr. 1952, n. 5, p. 10).

⁸⁹ C. Souza, *A Educação pela leitura: registros de uma revista escolar*, São Paulo, FEUSP, 1996.

⁹⁰ B. Carvalho, *Compêndio de Literatura Infantil para o 3º ano Normal*, São Paulo, Editora Nacional, 1959, p. 45.

⁹¹ M.F. Rego, *O Aprendizado da Ordem. A ideologia nos textos escolares*, Rio de Janeiro, Achiamé, 1981.

⁹² In 2011 Casa Publicadora Brasileira requested the publication of three pages of my study on the book *Coração*, to make up fascicle 7 of Portuguese Language for the 3rd bimester of the second year of Middle School. The article is part of the unit «Text for scientific dissemination: the scientific article», in which the authors of that work use it as an example of a text circulating on the web <http://www.uff.br/lihed/primeiro_seminario/index.htm> (last access: 8.01.2017), to present the format of a scientific article and comprehension as to how this genre is constituted.

⁹³ He also cites as a reader of this book, Henry Miller, the American writer.

Now knowing Italian history much better than in my young days, I am increasingly convinced that when he wrote it, De Amicis wanted to compose a civic anthem that, sung by thousands of children's voices, would make the country more patriotic and render irreversible the reunification for which he had fought⁹⁴.

The topicality of Coração: projecting ideas

Coração is a significant work for a period – the *Risorgimento* (Post-Unification Italy), showing the education, culture and national project for a liberal and bourgeois Italy. It is an example of a way of writing and understanding school books and reading book for boys and girls, aiming at a perfect alchemy of the individual, civic and patriotic virtues.

Coração illustrates the virtues of an education founded on the values of the heart. It is a publication dedicated to school: to a patriotic pedagogy that believes that the idea of nation is learned in the family and on the schoolbenches. Faith in school as the only humanistic translation of the nation is supported on two columns, more ideal than real – family and the State. G. Pécout interprets it as the «new unitary catechism which announces the hopes of the *Risorgimento*»⁹⁵. For P. Cabanel⁹⁶, the book is a small treatise on personal, family and social morals, as well as of civic and patriotic instruction⁹⁷.

J. Leenhardt analyzes how societies tried to use literature as a source of examples, in at least two senses: on the one hand it allows the reader to get to know the credible worlds and, on the other hand, this credible character involves the reader in a process of identification, in a relationship of acknowledgment, knowledge and imagination about this «world of the book». The exemplariness of the literature thus lies in the possibility that the individual can establish imaginary ties with others like them, and dissimulate the lack of symbolic ties⁹⁸.

⁹⁴ S. Brito, *Confissões, críticas e conselhos de um rato de biblioteca*, São Luis/MA, s/ed, 2009.

⁹⁵ Pécout, *Le livre Coeur*, cit., p. 483.

⁹⁶ Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux (XIX et XX siècle)*, cit., p. 528.

⁹⁷ P. Cabanel points out that *Cuore* inspired several works with different goals: Darwinistic (*Testa*); Catholic (*Vita di collegio*); Nationalist (*Maré and Cuoricini d'oro*); Jewish (*Cuore d'Israelle*); Fascist (*Cuore del novecentos* by Giuseppe Fanciulli – 1938), see Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux (XIX et XX siècle)*, cit., p. 560.

⁹⁸ J. Leenhardt, *A construção da identidade pessoal e social através da História e da Literatura*, in J. Leenhardt, S. Pesavento (edd.), *Discurso histórico e narrativa literária*, Campinas, ed. by UNICAMP, 1998. pp. 47-49. Formation novel also take this perspective. For P. Nazari the objectives of a formation novel are: autonomy (forming oneself), totality (full formation); harmony (harmonious formation). M. Mazzari, *Apresentação*, in J. Goethe, *Os Anos de Aprendizado de Wilhelm Meister*, São Paulo, Editorial 34, 2006, p. 14. For Lukács, the formation novel is characterized by its content, which allows the education of men in the practical understanding of reality. In the formation novel there is a relationship between the humanistic formation of the total personality and the world of society, which leads to humanizing the reader. G. Lukács, *Posfácio*, in Goethe, *Os Anos de Aprendizado de Wilhelm Meister*, cit., p. 581.

Translated into twenty-five languages⁹⁹, published in many countries and on different supports¹⁰⁰ – France¹⁰¹, Spain¹⁰², Argentina¹⁰³, Mexico, Colombia¹⁰⁴, Portugal¹⁰⁵, Chile¹⁰⁶, Japan, Yugoslavia, England¹⁰⁷, Holland, Morocco, Norway, Cuba and others – it shares an ideological view of society and a political message in accordance with the capitalist system¹⁰⁸.

⁹⁹ According to R. Silva the work was translated into 40 languages. Silva. *Em alto-mar: narrativa de uma travessia*, cit., p. 6.

¹⁰⁰ In Italy there are two movie adaptations of this book, the most recent in 1984. There is also an adaptation to TV soap operas, In 1976 an animated cartoon was made with the story *From the Appenines to the Andes*, under the title Marco. There are also comic strips with the same story.

¹⁰¹ In 1892 it was published by Delagrave, in France, under the title: *Cours Livre de lecture pour toutes les écoles*. In 2001 it was published again with two essays by Umberto Eco, who expresses a «profound and spiritual aversion» for the work: «un exemple abject de pédagogie petite-bourgeoise, marquée par des intérêts de classe paternaliste, sadique et fin de siècle». However, «la société italienne qui s'est formée sur le modèle de Cuore a continué à faire de ce livre un guide pour son action, même quand elle ne lisait plus. En d'autres termes, elle a continué à écrire Cuore; de sorte que cela n'a rien d'un divertissement gratuit que de lire l'histoire italienne récente comme un appendice à ce livre». See U. Eco, *Franti strikes again*, in E. De Amicis, *Le Livre Coeur*, Paris, Rue d'Ulm Ed, 2001, pp. 351-355. P. Cabanel considers that *Tour de La France* and *Cuore*, respectively France and Italy teach children what a nation is. Regarding the translation or imitation of *Cuore* in France (see Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux*, cit., p. 8).

¹⁰² The Ministry of Public Education and Fine Arts of Spain, in 1929 published the *Catálogo de una pequeña Biblioteca de cultura general para niños y maestros de las Escuelas Nacionales* [Catalogue of a small general culture library for children and teachers of the National Schools] which includes three books by De Amicis: *Corazon*, *Diário de um niño*, *Recuerdos de la infancia*, *Naufrágio* [Heart, Diary of a boy, Memories of childhood, Shipwreck].

¹⁰³ De Amicis' work also was made into a film in Argentina: *La maestría de los obreros* (1942); *Corazón* (1947); *De los Apeninos a los Andes* (1960). Alberto Manguel also read *Cuore*, «childishly sentimental, full of heroic, suffering children». A. Manguel, *A Biblioteca à Noite*, São Paulo, Cia das letras, 2006. p. 41 About the work in Argentina, see R.P. Spregelburd, *De los Apeninos a los Andes: las lecturas de Corazón en la escuela argentina*, in H. Cucuzza, P. Pineau (edd.). *Para una história de la enseñanza de la lectura y escritura en Argentina. Del Catecismo colonial a la Razón de Mi Vida*, Buenos Aires, Miño y Dávila srl, 2002. pp. 228-251.

¹⁰⁴ Gabriel Garcia Márquez, in his book of memoirs, mentions reading De Amicis – «I, myself only took books that I had already read and that could not be repeated: Jeromín, by Father Coloma, which I never finished reading; A Voragem, by José Eustasio Rivera; Dos Apeninos aos Andes, by Edmundo De Amicis; and my grandfather's dictionary, of which I read passages for hours and hours». See G.G. Márquez, *Viver para contar*, Rio de Janeiro, Record, 2003, p. 173.

¹⁰⁵ In 1998, the book was published in a new edition by Moderna Editorial Labores (310 p.), hard bound and illustrated, with the stimulating sentence below the title – «A passionate diary. The fascination of children with their first teachers». On the back cover there is another high sounding sentence to the reader «if on earth there were a little corner where hope did not wilt, it would be a kindergarden full of the smiles of children».

¹⁰⁶ In Chile it was published by Gaivota and is considered a reading book for boys aged 12 to 15 years.

¹⁰⁷ It was translated under the title *Heart*, in 1895; in 1899, it began to be published under the title *Enrico's Schooldays*.

¹⁰⁸ Spregelburd, *De los Apeninos a los Andes*, cit., p. 231.

It is also a major witness of a time when there was a great desire and interest in civil and social education: «in regenerating the consciences, overcoming the prejudices and secular divisions, in seeking a linguistic, cultural and national integration. “Thus it was a power instrument for the cultural nation unification under the intellectual guardianship of the bourgeoisie [...] with a certain historical responsibility for the propagation and perpetuation of an ideology, a mindset and educational habits»¹⁰⁹.

Umberto Eco considers that Amicis' book expresses a paternalistic humanism:

In this vast ocean of languid mollasses which is found throughout Henrique's diary, in this orgy of fraternal pardons, of sticky kissing, of embraces between social classes, of forced rewards and mischievous masks that offer emeralds to girls lost in the crowd, among the mothers who become familiar, the teachers with red pens, the gentlemen who embrace the coalmen and the masons who cry confused words of acknowledgement on the shoulders of rich landowners, there where everyone loves one another, understand each other, forgive each other, praise each one more than the other [...] there is not a single word of hate, of unreserved hate, without regrets and without remorse¹¹⁰.

Even if it is from the 19th century, the book is still being re-published and read during the 21st century, as an example of a moralizing text and as a historical document that allows multiple readings¹¹¹. At the beginning of this century, dominated by an ideological and social mutation with a «conservative» tendency, it is possible to see taking up the matter of teachability and learning of virtues that has been dealt with in several instances of society, from the perspective of (re) constituting the «heart of the heartless world».

The formation of a citizen to fulfill the social Standards/rules is aimed at achieving individual and social harmony. From this perspective, yesterday as today, the education of the national character, ie, of the citizen/citizenship is the material for the projects of modernity/modernization of society. Progress, the generation of goods/wealth and the consciousness of human dignity are the pillars of the educational project with a view to shaping the generations not allowing the human coming-to-be.

Coração contains universal assumptions. This ideal of forming a «more human man» presupposes the meaning of humanity as an ethical, not a moral value¹¹². The virtues are eternal goals of humanity, what changes is the concept

¹⁰⁹ A. Nobile, *Literatura infantil y juvenile. La infancia y sus libros em la civilización tecnológica*, Madrid, ed. Morata, 1992, p. 131.

¹¹⁰ U. Eco, *Éloge de Franti*, in E. Amicis, *Le Livre Coeur*, Paris, Rue d'Ulm ed., 2001. p. 343.

¹¹¹ In 1946, Vittorio de Sica wrote the script and co-directed the film *Cuore*, interpreting Professor Perboni. In 1985 there was another production. In 2001 it was filmed in another version, with the title song composed and sung by Andea Bocelli. In 2004, in Genoa, Italy, Tonino Conte made a scenic version of *Cuore* (see Brito, *Confissões, críticas e conselhos de um rato de biblioteca*, cit.).

¹¹² S. Rolnick, *Cidadania e alteridade. Fala proferida no IV Encontro Regional de Psicologia Social*, São Paulo, maio de 1992, s/p.

of man – of morals or of ethics, and thus the concept of education and teaching. Education for the «ethical man» and not for the «moral man» is what should be the great challenge for education in this millennium.

The story of this book and its multiple readings, yesterday and today, is also a greater history which is still being written. It is a «place of memory»¹¹³ for writing the history of the circulation of the book and reading in Brazil. *Coração* is a classic that lasts through the times, and has remained in silent dignity on paper and in the memories of its readers.

¹¹³ Nora considers them places that can be defined as «the entire significant unit, material or ideal, of which the will of men, or the work of time has made a symbolic element of the heritage of the memory of some community, with constructed significations, strengthening myths and the representations of a group» (see P. Nora, *Les lieux de mémoire*, Paris, Gallimard, 1997, p. 16).

*Critical Reviews
and Bibliography*



Rassegne critiche,
Discussioni, Recensioni

Critical Reviews / Rassegne critiche

Uno sguardo alla produzione storico-educativa più recente

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A reflection on the most recent historical-educational production

ABSTRACT: The article tracks an interesting bibliographic review of the most recent works of History of Pedagogy and History of Education published in recent years in Italy. The author, analyzing the individual works, presents the topics covered in each volume and puts the focus on some fundamental aspects of the Italian historical-educational culture.

EET/TEE KEYWORDS: Historiography; Historical Research; History of Education; Historical Method; Italy; XXth-XXIth Centuries.

I criteri di valutazione predisposti negli ultimi anni per saggiare le qualità scientifiche dei giovani studiosi che ambiscono alla carriera universitaria hanno, come è ben noto, alquanto modificato le caratteristiche della ricerca stessa. Se in precedenza prevalevano monografie di ampio respiro nelle quali si raccoglievano anni di ricerche, lavori che documentavano sul medio-lungo periodo l'attitudine alla ricerca e spesso si concludevano con prodotti di elevato spessore, i nuovi orientamenti valutativi hanno messo in primo piano la quantità della produzione. I giovani studiosi sono così orientati fin dagli anni del dottorato a privilegiare scritti brevi e frequenti anziché spinti a dedicarsi a lavori di ampia portata, testi questi ultimi che sul piano della somma dei punteggi risultano perdenti rispetto alla saggistica breve.

Anche gli studi storico educativi e storico pedagogici non sfuggono – seppure forse in modo meno evidente se confrontati con altri comparti disciplinari – a questa drastica mutazione dei criteri valutativi. Lo dimostra questa breve rassegna nella quale viene presentato un campione della produzione relativa all'anno 2016 e al primo scorcio del 2017: sono molto più numerosi i lavori a più mani che i libri monografici, in prevalenza dovuti, inoltre, a studiosi non accademici. Non vorrei che questa constatazione fosse scambiata per un

giudizio: la qualità ovviamente dipende in ogni caso dalla novità, originalità e coerenza argomentativa.

Sarebbe interessante se quelli che oggi appaiono a molti i limiti dei criteri valutativi si trasformassero in opportunità per sperimentare nuove soluzioni di tipo “cooperativo”. Perché non pensare all’organizzazione di gruppi di ricerca impegnati su temi di vasto respiro, di durata pluriennale, aperti a docenti italiani e stranieri in grado di dar vita a un’impresa collettiva? L’integrazione tra i singoli saggi (o a più mani) necessari per raggiungere le mediane potrebbe produrre esiti storiografici di grande rilievo, difficilmente perseguibili da un singolo studioso.

Pestalozzi nella modernità

Un esempio di come sia possibile unire le forze intorno a un classico della pedagogia viene dalla sezione monografica dell’ultimo fascicolo della rivista on line «Formazione, Lavoro, Persona»¹ dedicata a Johann Heinrich Pestalozzi nel 190° anniversario della morte (1827-1927). Ai pedagogisti dell’Università di Bergamo (nelle cui iniziative rientra la rivista in oggetto) si deve da tempo un costante impegno sul versante della rilettura di alcuni classici e della presentazione biografica di figure significative della storia pedagogica (Rousseau sotto varie prospettive, il giovane Gentile, Calò, Agosti, Marrou e ora Pestalozzi).

Si tratta di un impegno un po’ controcorrente. Se non sono mancati anche recentemente altri contributi sui maestri della riflessione pedagogica (ad esempio Volpicelli, Siciliani De Cumis, Cambi, Gennari, Xodo), non sfugge che l’interesse per questo genere di studi è alquanto diminuito rispetto a qualche decennio orsono. Le ragioni sono diverse: ragioni dovute alla scarso *appeal* editoriale, ragioni legate all’ampliamento dei fronti dell’indagine storico educativa, ma anche ragioni vittime di una visione della pedagogia rinchiusa entro orizzonti empirico-operativi e ostaggio di un sapere immediatamente spendibile.

I saggi pestalozziani proposti dalla rivista bergamasca spaziano su varie tematiche. Solo due sono di impianto storiografico: quelli di Didier Moreau sulle interpretazioni pestalozziane di Fichte e di Madame de Staël e di Andrea Potestio con la lettura critica che di Rousseau (di cui Potestio ha curato da poco un’eccellente traduzione dell’*Emilio*) ha fatto il padre di Gertrude. Gli altri contributi sono orientati a investigare se e come Pestalozzi abbia ancora qualcosa da dire nel nostro tempo e nella nostra temperie educativa. La base di partenza è la convinzione che un “classico” è tale se, pur a distanza di tempo, è ancora in grado di interfacciarsi con i problemi contemporanei.

¹ E. Scaglia (ed.), *Pestalozzi nella modernità*, «Formazione, Lavoro, Persona», n. 21, luglio 2017, pp. 5-135.

Questo meritorio e ambizioso intento è coltivato con vari livelli di accortezza interpretativa. Alto è infatti il rischio – che non tutti gli autori sono riusciti a scansare – di attualizzare situazioni e problemi inflessibilmente storicizzati.

Non è possibile qui sintetizzare la varietà delle tematiche affrontate. Possiamo solo ricordare alcune dei motivi pestalozziani che vengono più spesso richiamati (il valore dell'infanzia, l'importanza dei legami affettivi, le ineliminabili tensioni tra idealità e realtà in qualsiasi piano educativo, il difficile ruolo dell'educatore) e la bella e ricca postfazione di Egle Becchi che invita a considerare i contributi come un antecedente a un lavoro più approfondito, propedeutico «a un'opera più fondata, dettagliata, rifinita» che non si sottragga anche alle risultanze della storiografia pestalozziana più recente.

L'attualità di Herbart

Anche il libro di Ignazio Volpicelli su Herbart² è incentrato sulla rilettura di un “classico” il cui apporto alla storia della cultura pedagogica del XIX secolo è ben noto: al filosofo e pedagogista oldemburghese si devono infatti non solo uno dei primi e più autorevoli tentativi di definire cos'è la pedagogia, ma anche la messa a punto di prassi didattiche del tutto innovative per i suoi tempi e l'impegno per la formazione degli insegnanti in modo da rendere più efficace la scuola. Fu su queste basi che nella seconda metà dell'Ottocento l'herbartismo conobbe una fortuna straordinaria e influenzò direttamente o indirettamente gli orientamenti scolastici di numerosi Paesi europei e non, compresa l'Italia.

La biografia culturale di Volpicelli è strettamente legata agli studi su Herbart, allineandosi e proseguendo una tradizione di interessi herbartiani che in Italia ha avuto illustri antecedenti, da Luigi Credaro a Lombardo Radice e poi Nicola Petruzzellis, Alfredo Saloni e in tempi più ravvicinati soprattutto Bruno Bellerate.

Il maggior merito che, secondo Volpicelli, va tuttora riconosciuto a Herbart è la sua capacità di definire con puntualità terminologica e chiarezza metodologica i diversi aspetti della questione educativa. Egli ritorna più volte e con nuovi argomenti sulle tematiche centrali dell'agire pedagogico mediante un rigoroso processo di ricerca che potremmo definire ricorrente, perfezionando e chiarendo il suo pensiero. In tal modo egli sfugge al rischio di restare nella nebbia dei concetti generici e il suo argomentare diventa strategico «per restituire pieno significato a concetti di cui si è talvolta smarrito il senso e la problematicità ad essa immanente» (p. 12).

² I. Volpicelli, *Costruzione e struttura della pedagogia generale. Saggio su Herbart*, Lecce-Rovato, Pensa Multimedia, 2016, p. 250.

Per queste ragioni ad oltre due secoli dalla pubblicazione dello scritto herbartiano forse più noto la sua lettura è «tuttora estremamente istruttiva» per aiutarci a dipanare la nebbia di concetti e pseudoconcetti che avvolge ancora la pedagogia odierna.

Il merito di Volpicelli va tuttavia ben oltre l'intelligente sforzo di giustificare l'attualità dell'amato Herbart: il suo saggio – ricchissimo di spunti e suggestioni – disegna un affresco sulle diverse anime cultura tedesca tra fine Sette e inizio Ottocento e la peculiare posizione del professore di Gottinga, sulla sua proposta pedagogica così diversa da quelle allora prevalenti di Locke e Rousseau, sulla necessità di inverare l'insegnamento kantiano entro precise regole in grado di orientare la libertà dell'uomo attraverso una gradualità di azioni opportunamente definite.

Minoranze culturali e processi formativi

Merita attenzione anche un'altra sezione monografica, quella apparsa recentemente sulla «Rivista di storia dell'educazione»³. L'argomento trattato riguarda la complessa questione del governo della diversità sociale, culturale, religiosa nelle società europee con una particolare attenzione al ruolo svolto in positivo o in negativo dai processi formativi e di scolarizzazione rispetto alle minoranze di vario genere. Tema d'indubbio interesse, finora non moltissimo approfondito in sede storico-pedagogica, di sicura attualità.

I contributi della sezione lo affrontano sotto due principali prospettive: una più specificamente storica con saggi dedicati all'educazione femminile durante il fascismo (Michela D'Alessio), alla scuola in Alto Adige nell'immediato primo dopoguerra (Andrea Dessardo), alla presenza protestante in Toscana (Andrea Mannucci). Il secondo sguardo è concentrato su esperienze attuali con i contributi sull'accoglienza dei profughi al memoriale della Shoah di Milano (Stefano Pasta), sulla presenza dei rom nel Salento (Antonio Ciniero) e sul ruolo della memoria personale e collettiva nella formazione della cittadinanza europea (Laura Collacchioni).

Luca Bravi e Tommaso Vitale s'incaricano di dare una certa unitarietà d'intenti ai diversi apporti con una apprezzabile introduzione che promette tuttavia più di quanto l'insieme dei saggi restituisca⁴. La sezione sconta infatti una certa disomogeneità metodologica, peraltro quasi inevitabile data i diversi

³ L. Bravi, T. Vitale (edd.), *In-dipendenza*, «Rivista di storia dell'educazione», vol. 4, n. 1, 2017, pp. 9-126.

⁴ Nella loro presentazione compare anche la citazione di un saggio di Manuela Gallerani sulle *Katakombenschulen* che dal contesto in cui è disposto si direbbe parte della sezione, senza tuttavia trovarne traccia nel fascicolo, almeno nella versione pdf a mia disposizione.

obiettivi perseguiti dagli autori, e accosta studi e ricerche elaborati con finalità solo genericamente riconducibili all'approccio monografico. Pur con questi limiti i saggi documentano i notevoli spazi che si aprono alla ricerca storico-educativa se essa viene opportunamente situata nei contesti sociali in cui si svolgono i processi di scolarizzazione e di formazione.

Giovanni Gozzer a cent'anni dalla nascita

Il volume, curato da Quinto Antonelli e Roberta G. Arcaini, dedicato a Giovanni Gozzer (1915-2006)⁵ ripropone all'attenzione degli studiosi una interessante figura di uomo di scuola, amministratore e militante politico influente in alcune scelte politico scolastiche del secondo dopoguerra. Il libro raccoglie contributi di natura diversa: le relazioni proposte durante un convegno svoltosi a Trento nel dicembre 2015, documentazione fotografica e soprattutto la riproposta di una corposa intervista autobiografica rilasciata da Gozzer nel 1997 (già apparsa a suo tempo su una rivista a circolazione locale).

Il nome di Gozzer non è certamente ignoto e molti studi di storia scolastica ne hanno ricordato – in verità alquanto tangenzialmente – il ruolo di *grand commis* impegnato a modernizzare il sistema scolastico italiano. Coinvolto direttamente in varie forme di presenza sociale (dall'associazionismo cattolico alla militanza politica nelle file della Democrazia Cristiana), Gozzer è stato un attivo protagonista nelle vicende scolastiche nazionali. Si sentiva l'esigenza di una rassegna che ne indagasse i diversi ruoli e compiti svolti tra la fine degli anni '40 e la prima metà degli anni '70 nel Ministero dell'Istruzione, nel Centro Europeo per l'educazione di Frascati (oggi Invalsi) e negli organismi internazionali sull'educazione fino alla volontaria uscita dai circuiti ufficiali. Di qui in poi Gozzer condivise con l'editore romano Armando, il futuro ministro dell'Istruzione Salvatore Valitutti e pochi altri una posizione assai critica verso la politica scolastica che oggi diremmo «delle larghe intese» con provvedimenti concordati tra governi, Pci e sindacati.

Il libro esplora le varie stagioni della militanza gozzeriana con alcuni saggi di taglio più memorialistico e in qualche caso celebrativo, altri con intenti più storiografici. Il volume costituisce un primo e utile contributo a una più adeguata conoscenza dell'uomo di scuola trentino e potrebbe aprire la strada a una biografia ad ampio raggio sostenuta dalla documentazione privata tuttora conservata dalla famiglia.

⁵ Q. Antonelli, R.G. Arcaini (edd.), *Giovanni Gozzer a 100 anni dalla nascita*, Trento, Provincia autonoma di Trento-Soprintendenza per i Beni culturali, 2016, p. 211.

Studi sul Movimento di Cooperazione Educativa

Un'altra biografia dedicata a un personaggio meno noto, ma a lungo presente nella vita scolastica italiana, Aldo Pettini (1922-1994), viene proposta da Maria Rosaria Santo⁶. Pettini appartiene a quella schiera di maestri e direttori didattici che, con varie collocazioni ideali (cattolici, marxisti, socialisti umanitari, liberali) tra il dopoguerra e gli anni '70-'80 furono protagonisti di innovazioni didattiche e scolastiche che, veicolate dagli organismi associativi e dalle riviste professionali, consentirono alla scuola primaria di rinnovarsi dall'interno mediante la moltiplicazione di «buone pratiche».

Pettini, insieme a Giuseppe Tamagnini, Bruno Ciari, Mario Lodi fu, in particolare, tra i principali animatori del Movimento di Cooperazione Educativa che, come è noto, diffuse anche in Italia le tecniche didattiche messe a punto dal pedagogista francese Célestin Freinet.

Il volume si presenta con una doppia impostazione: una prima parte dedicata all'impegno di Pettini nel Movimento (che consente all'autrice di approfondire alcuni passaggi della vita del sodalizio, le cui vicende oscillarono spesso tra *engagement* politico e priorità assegnata alla diffusione delle tecniche freinetiane e allo sviluppo dello spirito cooperativo nella scuola) e una seconda più strettamente centrata sulle esperienze didattiche di Pettini e la sua capacità di interpretare le «tecniche» in modo personale.

Alle vicende passate e presenti del Movimento si sofferma un altro recente volume che viene bene qui citare, *Pedagogia popolare. Da Célestin Freinet al MCE-FIMEN* di Rinaldo Rizzi⁷, una delle memorie storiche della cooperazione scolastica in Italia. Anche se si tratta di un testo con scopi principalmente divulgativi e promozionali (come l'autore indica nella *Prefazione*), la sua lettura offre motivi di riflessione sul graduale indebolimento della cultura professionale magistrale che non ha colpito soltanto il MCE, ma appare una caratteristica che accomuna le varie rappresentanze degli insegnanti.

Proprio nel momento in cui si è affermata una visione più professionale e meno vocazionale dell'attività docente è iniziata la parabola discendente dei sodalizi con finalità professionali tra insegnanti un tempo fiorenti e oggi sempre meno frequentati da maestri e professori. Quasi contestualmente è cresciuto un sindacalismo che via via ha smarrito una visione "alta" di scuola per appiattirsi su rivendicazioni più preoccupate della tutela degli interessi particolari che impegnato e perseguire obiettivi connessi alla qualità del servizio scolastico.

Questo duplice fenomeno ha prodotto un forte impoverimento di quel particolare lavoro innovativo svolto e confrontato all'interno delle comunità dei

⁶ M.R. Santo, *Al di là delle tecniche. La pratica educativa di Aldo Pettini*, Milano, Prometheus, 2016, p. 250.

⁷ R. Rizzi, *Pedagogia popolare. Da Célestin Freinet al MCE-FIMEN*, Foggia, Edizioni del Rosone, 2017, p. 172.

docenti (un lavoro molecolare, quotidiano, silente ma estremamente importante per l'evoluzione scolastica) che in passato – in specie nella scuola elementare – è stata spesso l'anima del cambiamento. Come è noto alcune di queste esperienze hanno offerto alla politica spunti per nuove sistemazioni normative. Non si possono spiegare le trasformazioni scolastiche degli ultimi decenni, comunque si vogliano giudicare (tempo pieno, integrazione degli alunni portatori di handicap, superamento del maestro unico, impiego meno manualistico del libro di testo, ecc.) se non si fa riferimento a quel grande fermento che percorse l'Italia scolastica dagli anni '60 in poi.

Cesare Scurati e la formazione degli insegnanti

Viene calzante a questo punto citare il volume dedicato a Cesare Scurati (1937-2010), già docente di Pedagogia e Didattica nell'Università Cattolica e animatore di molte iniziative nel mondo degli insegnanti specie primari, curato da un gruppo di suoi allievi ed estimatori⁸.

Scurati è stato una delle voci più autorevoli in vari ambiti della scuola italiana e, in specie, in quello della professionalizzazione dei docenti. La sua militanza a fianco dei maestri – che costituisce un tratto specifico del suo profilo intellettuale – era una diretta ed immediata conseguenza della convinzione che, senza docenti adeguatamente preparati e disposti a fare della professione un'occasione di crescita culturale e pedagogica, nessun cambiamento era possibile. Il baricentro del volume è posto dagli autori (Pierpaolo Triani, Graziano Biraghi, Damiano Felini e altri) proprio in questo specifico aspetto della pedagogia scuratiana. La pubblicazione di un'ampia antologia di scritti dello studioso scomparso non è solo un omaggio memorialistico, ma intende prolungarne l'insegnamento.

Due saggi si prefiggono di collocarne l'azione nella vita scolastica del suo tempo: uno un po' generico non offre grandi spunti, l'altro (dovuto a Evelina Scaglia) più puntuale e rigoroso. La giovane studiosa bergamasca individua alcuni spunti interpretativi meritevoli di approfondimento come, ad esempio, il ruolo svolto dal pedagogista milanese nel complesso transito tra l'eredità pedagogica del personalismo degli anni '40-'50 e l'incontro con la pedagogia statunitense che si preparava a diventare egemone anche da noi.

Sarebbe interessante – e forse la Scaglia potrebbe considerare l'eventualità di occuparsene – capire meglio le caratteristiche di questo transito (che ovviamente non ha interessato soltanto il pedagogista milanese, ma l'intera generazione di pedagogisti cattolici sua coeva) spesso descritto come il superamento del provincialismo nostrano, ma anche punto terminale di una tradizione fatta di

⁸ *L'innovazione nella scuola. Per la formazione degli insegnanti*, Brescia, La Scuola, 2017, p. 163.

artigianato pedagogico per nulla secondaria per qualità e ricchezza, tradizione che oggi appare smarrita.

L'educazione degli Italiani attraverso il paesaggio

Il volume curato da Dorena Caroli ed Elisabetta Patrizi sulla costruzione dell'identità nazionale attraverso la valorizzazione del paesaggio e dei beni culturali⁹ s'inserisce in un filone di ricerca che, a mano a mano che viene svolto, si sta rivelando una specie di ricco giacimento minerario ancora in gran parte, da esplorare. All'esame dei giornali magistrali e del loro impiego come fondamentali fonti per la ricostruzione storico scolastica, passando per i libri di scuola e i quaderni si sono via via aggiunte e indagate nuove tematiche tradizionalmente poco considerate in passato dagli studi storico pedagogici italiani, ma necessarie per disporre di una credibile ricostruzione della vita scolastica del passato. Questo libro si inserisce per l'appunto in questo scenario.

L'attenzione rivolta ai sussidi didattici, ai libri-premio (testi di grande rilievo perché ad essi era associata una speciale forza simbolica), alle letture infantili, agli strumenti ginnici, ai banchi e all'architettura delle scuole e a tutto ciò che in forma diretta o indiretta poteva agire sulla formazione delle giovani coscienze costituisce infatti il brodo di coltura nel quale è maturato il libro di Caroli e Patrizi. Il *focus* è centrato sul ruolo svolto dalla celebrazione del patrimonio culturale e naturale del nostro Paese nella veicolazione dell'amor di Patria e, attraverso questo, nell'identificazione in una comune lingua e in comune destino: la nazione.

Il tema è indagato secondo diverse prospettive e lungo un arco cronologico che va dall'Unità fino agli anni del Fascismo compresi. Un primo approccio riguarda la produzione libraria, sia quella di carattere generale e letterario (Elisabetta Patrizi) sia quella più specificamente destinata alla scuola (Roberto Sani, Dorena Caroli, Luigiaurelio Pomante). Lo scopo è quello di capire attraverso quali canali le «bellezze d'Italia» entrano nei programmi scolastici, concorrendo a formare una coscienza popolare capace di oltrepassare i confini locali. Una seconda ribalta attraverso la quale si distribuiscono in mille rivoli le rappresentazioni di monumenti, paesaggi, tradizioni e personaggi tipici è quella dei quaderni di scuola documentata (anche con molte utili illustrazioni) da Anna Ascenzi. Il saggio di Fabio Targhetta, infine, nutre, d'un lato, l'ambizione di fornire alcuni spunti per una giustificazione anche teorica circa il ruolo e la funzione del paesaggio e, dall'altro, presenta una rassegna sulle

⁹ D. Caroli, E. Patrizi (edd.), «Educare alla bellezza la gioventù della nuova Italia». *Scuola, beni culturali e costruzione dell'identità nazionale dall'Unità al secondo dopoguerra*, Milano, FrancoAngeli, 2017, p. 266.

diverse modalità di presentazione e di fruizione educativa del paesaggio e dei beni culturali in genere.

Se mi è permesso un piccolo appunto direi che – poiché le cose non nascono mai dal niente – il libro avrebbe senz'altro guadagnato se fosse stato previsto un capitolo introduttivo che collegasse l'attenzione al patrimonio culturale e naturale così vivo soprattutto dopo l'Unità all'interesse pedagogico ed educativo già coltivato tra Sette e Ottocento in tale ambito in duplice direzione: sotto il profilo delle testimonianze storiche (non c'è *Bildung* senza memoria) e sotto il profilo del contesto naturale (da Rousseau a Pestalozzi). Ma sono sicuro che non mancherà l'occasione per riprendere il discorso.

Alle origini della ginnastica scolastica

Il lavoro di Paolo Alfieri¹⁰ a differenza di quello sul paesaggio e in beni culturali solca un terreno già ampiamente arato, quello della storiografia dell'educazione fisica. L'autore sa tuttavia abilmente ritagliarsi un suo spazio e offrire un saggio che non ha nulla del *dejà vu* e che si legge con piacere e profitto. Due i principali motivi di interesse del libro.

Il primo sta in un'ampia introduzione nella quale Alfieri compie una minuziosa ricostruzione degli studi che negli ultimi decenni si sono moltiplicati in questo specifico settore della storia educativa. Accanto alla segnalazione di alcuni limiti dovuti al prevalere di compilazioni con scopi didattici viene tratteggiata la nuova stagione di studi e ricerche di recente avviata dovuta a giovani studiosi che hanno cominciato a frequentare archivi, sfogliare documenti e ad allinearsi al rigore storiografico necessario per transitare dalla divulgazione didattica alla documentazione scientifica.

Il secondo motivo di interesse riguarda il punto di osservazione nel quale l'autore si colloca per ricostruire le origini dell'insegnamento della ginnastica nella scuola elementare. Senza trascurare la questione sotto il profilo politico e le risonanze militaresche, l'autore privilegia l'esplorazione dei diversi tasselli (organizzativi e didattici) intorno a cui si costituisce la disciplina scolastica della ginnastica fino alla sua consacrazione ufficiale con la legge del 1878.

La ricostruzione di questa vicenda passa attraverso fasi che sono scandite da istanze igieniche (il rafforzamento del corpo), ragioni pedagogiche (il dominio del corpo come esercizio della volontà), la elaborazione di appropriate pratiche ginniche (connesse a teorie tra loro a confronto o addirittura in conflitto), la predisposizione di un'adeguata manualistica indispensabile per la preparazione dei maestri.

¹⁰ P. Alfieri, *Le origini della ginnastica nella scuola elementare italiana*, Lecce-Rovato, Pensa Multimedia, p. 184.

L'auspicio, a lettura ultimata, è che Alfieri prosegua nella ulteriore ricostruzione della storia della disciplina ginnica. Per quanto significativo il segmento della scuola elementare rappresenta ovviamente solo un tassello di un disegno molto più ampio. L'estensione dell'approccio storiografico già collaudato consentirà di delineare in un unico affresco le trasformazioni e gli scenari che di volta in volta hanno contraddistinto la funzione educativa e scolastica dell'educazione fisica.

Le scuole all'aperto e il movimento per l'educazione nuova

Il tema dell'educazione del corpo è parte integrante, anche se non esclusiva, anche di un altro testo, quello curato da Maria Tomarchio e Letterio Todaro che raccoglie i contributi presentati a un convegno svoltosi qualche tempo fa presso l'Università di Catania sulle esperienze di educazione all'aperto d'inizio Novecento¹¹. Gli studiosi dell'ateneo ove insegnò Giuseppe Lombardo proseguono con questa rassegna l'opera di scavo avviata da tempo nel campo dell'educazione nuova e delle pedagogie attivistiche.

I diversi saggi sono dovuti a studiosi stranieri (Rita Hofstetter, Nathalie Duval, Mariano Gonzáles Delgado) e italiani (oltre all'introduzione di Tomarchio e il contributo di Todaro, anche Mirella D'Ascenzo, Gabriella D'Aprile, Luciana Bellatalla, Viviana La Rosa) e sono accomunati da un duplice scopo: documentare le principali iniziative di scuole all'aperto – esperienze avviate in vari Paesi europei ai primi del XX secolo dietro la spinta soprattutto di medici e igienisti – e, a partire da questa base, intrecciarne gli intenti con i coevi fermenti dell'educazione nuova che, come è noto, fecero del rapporto tra ambiente, vita naturale e crescita (fisica e psicologica) dei bambini un passaggio strategico.

I saggi non offrono dettagli di prima mano e propongono per lo più tematiche singolarmente già note. Il quadro d'insieme fornito dal libro è tuttavia utile e suggerisce qualche riflessione. Nonostante la relativa breve durata della maggior parte di queste iniziative innovative esse ebbero il non secondario merito di immettere nelle prassi quotidiane e nelle politiche scolastiche una sensibilità più avvertita per le pratiche igienico-corporee ed educative all'aria aperta e, più in generale, per il rapporto tra scuola ed ambiente naturale. La caratteristica privatistica o semipubblica, poi, di queste scuole (dovute a filantropi, educatori e amministratori locali) il cui sviluppo si svolse all'esterno dei sistemi scolastici nazionali conferma come i processi innovativi sono in genere il frutto di risposte a esigenze a cui il potere pubblico non è sempre in grado di far fronte.

¹¹ *Spazi formativi, modelli e pratiche di educazione all'aperto nel primo Novecento*, Santarcangelo di Romagna, Maggioli editore, 2017, p. 198.

Su un piano più specificamente pedagogico i saggi ribadiscono che il confronto tra educazione nuova/scuola all'aperto svela percorsi assai più tortuosi del previsto e soprattutto alquanto diversi sul piano delle motivazioni. La cosa non sorprende: anche in questo caso si riflettono letture dell'incipiente attivismo dovute ad analisi teoriche differenti e non facilmente componibili (basta pensare alle diverse prospettive di Claparède e Ferrière e, in Italia, al contrasto tra Maria Montessori e Giuseppe Lombardo Radice).

La formazione dell'uomo nuovo del fascismo

Gli sforzi del fascismo per creare un consenso che avrebbe dovuto assicurare la formazione di un «italiano nuovo» degno delle ambizioni nazionalistiche e imperialistiche dell'Italia continua a esercitare, anche sul versante delle ricerche educative, un interesse costante. In questa direzione si svolgono due recenti sondaggi che apportano ulteriori e nuovi elementi ai già moltissimi esistenti riguardanti l'educazione fascista. Il primo di Giulia Simone e Fabio Targhetta¹² è già stato recensito sul precedente fascicolo della rivista a cui rinviemo¹³, il secondo, curato da Massimo Castoldi¹⁴, riguarda le letture infantili volute dal fascismo per imprimere nei più piccoli veri e propri «ideali morali» che ne orientasse il pensiero e gli stili di vita.

Durante il Ventennio la letteratura per l'infanzia fu al centro di molte attenzioni da parte del regime, dapprima in forma discontinua, poi in modo più sistematico fino a creare una serie di modelli narrativi ed iconografici utili a plasmare le coscienze giovanili e ad influenzare l'immaginario collettivo. Il culmine di questa strategia fu rappresentato dal convegno di Bologna del 1938 con la precisa individuazione dei criteri della narrativa giovanile fascista, condita dei miti razzisti, xenofobi e antisemiti.

Un approfondimento particolare viene riservato al «romanzo di formazione» al quale si dedicarono i maggiori scrittori per l'infanzia del Ventennio (Salvator Gotta, Renzo Pezzani, Olga Visentini, Giuseppe Fanciulli) e in cui si manifesta una vera e propria epica fascista. Il combattente-eroe della Grande Guerra diventa il fascista-squadrista, l'epopea della Vittoria si trasforma nella Rivoluzione delle camicie nere: questo «culto delle origini» è la condizione necessaria per garantire la legittimità e la continuità del fascismo.

¹² G. Simone, F. Targhetta, *Sui banchi di scuola tra fascismo e Resistenza. Gli archivi scolastici padovani [1938-1945]*, Padova University Press, 2016, p. 188.

¹³ «History of Education & Children's Literature», vol. 12, n. 1, pp. 731-733.

¹⁴ M. Castoldi (ed.), *Piccoli eroi. Libri e scrittori per ragazzi durante il ventennio fascista*, Milano, FrancoAngeli, 2016, p. 174.

Il volume curato da Massimo Castoldi offre uno spaccato a 360° di questa realtà e rappresenta perciò un contributo non soltanto specialistico riconducibile allo specifico ambito della letteratura infantile. Un lavoro – vorrei sottolineare – interessante che documenta come la storia dell'educazione guadagni in spessore e credibilità quando è perseguita con l'apporto di competenze diverse e differenti punti di vista.

Grazie infatti alla collaborazione di esperti nell'ambito letterario educativo (Mariella Colin, Sabrina Fava, Elena Surdi, Martino Negri) e di studiosi di storia politica (Enzo R. Laforgia, e lo stesso curatore) e di storia dell'editoria (Ada Gigli Marchetti, Elisa Marazzi, Giorgio Montecchi) il tema della narrazione fascista per l'infanzia viene colto nella sua complessità e varietà di prospettive, non escluse quelle di quanti, talvolta in modo ambivalente (come, a esempio, nel caso di Bruno Angoletta e Antonio Rubino), seppero mantenersi ai bordi o addirittura al di qua (Giuseppe Latronico e Aurelio Castoldi) della propaganda del regime.

Monelli di carta

Concludo la mia rapida scorribanda nella produzione storico-educativo-pedagogica più recente con la segnalazione del volume di cui è autrice Benedetta Quadrio¹⁵ un libro che, come il precedente, è in senso stretto da catalogare tra i saggi di letteratura per l'infanzia, ma che si può anche leggere come un testo che fornisce una documentazione letteraria preziosa per comprendere le dinamiche della transizione tra l'infanzia ottocentesca e l'infanzia sbarazzina del primo Novecento.

L'autrice ripercorre il cambiamento della concezione infantile che si svolge lungo la narrazione collodiana e i racconti di alcuni autori che più o meno direttamente si richiamano all'autore di *Pinocchio* fino alle ribalderie di *Gian Burrasca* e alle *pistole* di Omero Redi, termine *ad quem* della trattazione. L'analisi di Quadrio indaga la figura del monello, presentato come un personaggio nuovo, connotato da diverse e talvolta contraddittorie sfumature, del tutto distinto dagli stereotipi bambino buono/bambino cattivo che fino all'ultimo scorcio del XIX secolo dominarono la scena dei libri per bambini e ragazzi.

I comportamenti dei monelli e le loro esperienze di vita condotte tra espedienti per sopravvivere, una scuola spesso lontana e la ricerca del lavoro alla mercé di persone non di rado disoneste e approfittatrici costituiscono una robusta spinta a ripensare il rapporto bambino/adulto e a sottoporre a seria verifica le prassi

¹⁵ B. Quadrio, *Monelli di carta. Da Collodi a Pistelli: genesi e sviluppo di un paradigma educativo*, Parma, Edizioni Junior-Gruppo Spaggiari, 2017, p. 214.

tradizionali degli adulti e a renderle meno stereotipate. Attraverso le avventure dei monelli l'autrice offre infatti uno spaccato realistico della società italiana del tempo con le contraddizioni che agitano le principali istituzioni educative: la famiglia e la scuola.

Per queste ragioni il libro di Quadrio, come si è anticipato poco sopra, è un saggio non solo destinato al circuito letterario, ma un contributo utile anche sul versante storico-pedagogico.

A reflection about the big smallness: niche marketing, the American culture wars and the new children's literature

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ABSTRACT: The book under review is a pioneering work exploring the niche market picture books in the United States. Abate examines amateur-authored, independently published picture books on specialty subjects released during the opening decades of the twentieth century, arguing that they are born out of the demand for specialized subject matters of specialized demographics, join in national debates of contentious socio-political issues and reflect changing ideas of childhood. Though the books Abate examines are published by small houses for small fragments of population, yet the genre they represent are strong complements to mainstream works and represent future possibilities of picture books. More importantly, Abate's research extends beyond selected examples to touch upon the whole landscape of picture books in the United States.

EET/TEE KEYWORDS: Niche marketing; Picture books; American culture; Children's Literature, XXth Century.

Michelle Ann Abate's monograph on amateur-authored, independently published picture books about a highly specialized subject for an equally specialized audience, is a brilliant work for those interested in the nichification of children's literature and its relationship with consumer capitalism and polarization of American political life¹. Instead of examining the mainstream children's literature and the general trend in the field, Abate chooses nichification in the picture book market, i.e., picture books especially tailored for the LGBTQ

¹ See M.A. Abate, *The Big Smallness: Niche Marketing, the American Culture Wars, and the New Children's Literature*, London and New York, Routledge, 2016 (Routledge Children's Literature and Culture Series).

(lesbian, gay, bisexual, transgender, queer) community who have issues that are often too embarrassing or tabooed to discuss, and she convincingly argues that the impact of this niche market picture books reaches far beyond their small audience, reflecting national political atmosphere, culture wars and changing ideas of childhood and childhood innocence. In the five chapters of her book, she discusses five titles as aesthetic, material and commercial products with political and ideological underpinnings. The significance of the niche market picture books also lies in their commercial success. As Abate observes, they are far from marginalized but are complementary to mainstream business. The small independent publishers can be regarded as research-and-development of major media conglomerates, or «stepping stones»² as Abate phrases it, often culminating in being bought by big corporate companies after their commercial success. Therefore, the study of the niche market can offer readers a view of a unique aspect of children's picture books in the United States that is often overshadowed by more popular and mass-audienced hits.

For any discussion on such a specialized genre encompassing specialized themes and specialized readers, a clarification of the term «niche» and the genre is not only greatly facilitating but entirely indispensable, and Abate has done a wonderful job in providing the general readers with an thorough overview of the origin, history and evolution of the niche mode of production in the United States. The Introduction begins with an explanation of the evolution of the meaning of 'niche', followed by the context in which the word obtained its modern meaning in the United States, thus situating the monograph in a specific societal and historical context in which the niche mode began to emerge. As pointed out by Abate, the niche mode was born out of the cry of the marginal demographic group (LGBTQ) for their own interests, voices and cultural products during the 1960s and 1970s. The social phenomenon nevertheless brought new commercial opportunities as it created the niche market for these minorities and further promoted the «nichification» of mass media in the US. Abate then points out the role that the new technologies, such as the World Wide Web, personal computer and software, helped to make the niche products possible. After situating the rise of the niche market in its societal, political and cultural context, Abate goes on to delineate briefly the history of the niche trend in picture books, which was pioneered by Lesléa Newman's *Heather has Two Mommies* in 1989. The niche market is a highly diversified and divided place, and Abate selects only five titles out of the many available titles. This entails a defense in the selection and organization of her book, which constitutes the last section in the Introduction. Abate's selection criterion can be summarized as: 1. preference to print books instead of electronic books; 2. preference to political charged texts; 3. preference to those titles that are involved in the culture wars and are therefore highly contentious; 4. preference to those titles

² *Ibid.*, p. 183.

that more apparently reflect the presence of adult control in the production and consumption of picture books. Abate's highly selective focus enables her to illuminate the aesthetic, material and commercial parameter of picture books out of the kaleidoscopic spectrum of the genre.

Chapter 1, *The Straight Dope: Ricardo Cortés's It's Just a Plant, Marijuana Use, and the Question of Prohibition Politics*, discusses a controversial text on a controversial topic: marijuana law. Abate's research on the history of the growing, use, and criminalization of marijuana challenges the often simplified public condemnation of marijuana by revealing the complicated and sometimes even ambiguous understanding of marijuana and its physiological and social effects. Her demystification of marijuana situates Cortés's work in the complex social context of the criminalization and legalization of marijuana, as well as Cortés's own ambiguous and sometimes even contradictory attitudes permeated in his work. Having read this chapter, though readers are still left to make their own decisions with their attitude towards marijuana, they are at least in a much more informed position to do so, just as Abate argues that what makes this picture book so threatening to the public is its hidden advocacy of child agency and youth civil disobedience.

Chapter 2, *Nip/Tuck Truth: My Beautiful Mommy, the Medicalization of Motherhood, and the Harmful Condition of Childhood Innocence*, displays a much more sustained analysis of the pictures in *My Beautiful Mommy*, instead of focusing on a lengthy historical and cultural context of the topic as she does in the previous chapter. The author Michael Salzhauer takes the opportunity of releasing this picture book as a public campaign to advertise for his primary career in real life as a plastic surgeon. By carefully going through the visual narrative of the *My Beautiful Mommy*, Abate examines what Salzhauer claims to be accurate information about cosmetic surgery that he offers through the picture book, and reveals it to be misrepresentation of cosmetic surgery as magical, easy, and almost pain-free transformation of women. More importantly, Abate argues that this misrepresentation comes more as the result of adults' desire to maintain the idea of an innocent child, shielded from upsetting information, as an intentional omission out of self-interest. In this fashion, Abate reveals the incompatibility of writing on a daring subject matter and keeping aligned to traditional ideas of childhood.

In Chapter 3, *Good Things Come in Small Packages: Little Zizi, Schoolyard Bullying, and the Sexualization of Boys*, Abate discusses the pressure of sexualization among boy in the 2008 picture book *Little Zizi*. While bullying is common in the school yard, sexual bullying deserves special attention since this topic is often avoided not only among children victims but also among parents. It is in this sense that the book is groundbreaking. However, Abate argues that, despite the book's bold endeavor to address the issue, it fails to set up the right solution to sexual bully. In *Little Zizi*, the young protagonist keeps silent about the sexual bullying he receives, but he miraculously wins at

the end and harvests his love. This pattern never works out in reality and fails to be of any help to those victims of school bullying. Abate also points out Lenain's failure to provide necessary information about the growth of penis and boy's maturation process so as to ease those boys' anxiety over penis size. What's more, by borrowing the concept of «the queer art of failure», Abate argues that, despite Martin's apparent and obvious obsession with the size of his penis and the fear of failure of manhood, he is paradoxically «a multivalent queer child»³.

Chapter 4 examines Paul M. Kramer's *Maggie Goes on a Diet*, a picture book often condemned for the author's lack of knowledge of pediatric nutrition. After the title was released, due to the massive blame on Kramer's lack of research in the field, even Kramer had to stand out to defend for himself and revised figures in his book. But Abate calls our attention to the issue of child autonomy and agency, a feat that Kramer accomplishes but is overshadowed by the book's shortfall in pediatric knowledge. Abate insightfully notes that the title character «has the authority to make decisions about her life as well as the agency to implement them»⁴. She compares the pattern of plot, in which Maggie arranges her life without any adult intervention, to the general conclusions drawn by Nodelman and Nikolajeva that, in children's literature, though the child protagonist is often empowered during the course of narrative, they have to return to the initial state of being under adult control and argues that this title is a rare exception in its plot, where Maggie appears without any mentioning of her parents at the beginning and ends her story out of home, instead of the usual locale where protagonists of children's literature often have to return after their adventures. It is in this sense that, though the book is often condemned for the author's lack of knowledge, it nevertheless accomplishes a rare feat «to undercut adult authority and destabilizes the existing power structure between children and adults»⁵.

Chapter 5 discusses the close link between *Me Tarzan, You Jane* and American Ex-gay movement. By reading the picture book in alignment to the premises of American Ex-gay movement, Abate argues that it serves as a renewed effort to pathologize prehomosexual children and to correct their sexual orientation after such efforts proved a failure among adults. Such movement and organizations base their principles in the Bible and scientific research. Thus the picture book can be regarded as advocating ex-gay ideology in its reconfiguration. But Abate goes beyond simply finding the link between the picture book and social movement in arguing that, under its more apparent ex-gay maxims, *Me Tarzan, You Jane* paradoxically exploits the homoerotic figure of Tarzan of the Apes, eroticize the protagonist's masculine physique

³ *Ibid.*, p. 121.

⁴ *Ibid.*, p. 127.

⁵ *Ibid.*, p. 146.

throughout the picture to convey homoerotic messages that leads to «narrative complexities and even contradictions»⁶ arising from the hidden tension between text and illustrations. Abate therefore convincingly demonstrates the complicated and even sometimes contradictory relationship between text and illustrations, which have been discussed by Nikolajeva and Nodelman but which receives a new light here.

After all the five cases with niche market picture books, the epilogue is refreshing as it takes readers to the vast real world of children's book publishing industry and view it from a more panoramic view as well as with a sense of historical development. Abate argues that there are two major influences that largely shape the landscape of children's literature in the US. One is the shift from the period where many independent, family-owned publishers existed in the twentieth century in the United States to the phase where the majority of children's book publishers are imprints of a few large media conglomerates, which decide whether to publish a book simply on the basis of making profits instead of taking artistic merits into consideration. The second influence is the shift from the phase before 1970s when elementary school teachers and librarians made decision to purchase books to the phase when publishers directly advertise to children in chain bookstores and other locales. The changes to both the producer and consumers have drastically altered the principles under which picture books are produced. A prominent result of this is the strategy of branded fiction used by large corporate companies which permeates in every spatial and temporal aspect of media conglomerates. In this way, reading becomes shopping. Abate argues that it is in this context that niche picture books can be regarded as a counterpoint to the trend of merchandising literary text, before which trend picture books were to a much greater extent produced out of the love of children's literature instead of being merely driven by profits. But Abate also nuances her research in niche market picture books in reminding readers that niche market picture books, after all, are «operating within the same basic economic system as their mainstream counterparts»⁷ and thus should be regarded as complementing the mass popular hits instead of replacing them. And it is in this sense that niche market picture books represent a new and contrasting mantra emerging in children's literature – «to think small»⁸.

Abate's monograph draws extensively from scholarships in picture books, children's book publishing, consumer capitalism, and American cultural life, and it exhibits her profound knowledge in the niche culture in American life and her excellent intellectual power to apply theories of children's literature in such highly selective, yet as important type of texts. Readers would often feel that they are led to tour a new city not through its main street but through its

⁶ *Ibid.*, p. 166.

⁷ *Ibid.*, p. 185.

⁸ *Ibid.*, p. 190.

narrow lanes and even *cul de sac* to have deeper contacts with its culture and life. Her analysis of the details of picture is surprisingly illuminating, and she always has a way to connect the minute details in pictures to develop a sustained and focused argument. The shortfall of the book lies in the epilogue where Abate introduces a new perspective, i.e., the influence of corporate control on the publishing and its effect on the quality of children's literature. Although she convincingly proposes that such influence has changed the marketing and the fate of many picture books, her discussion remains too general and fails to link this social factor to specific examples that she discusses in the previous five chapters. Therefore, the explanatory power of such a promising new perspective, having been introduced too late in the book, is not fully realized.

On the whole, Abate's work on niche market picture books is an excellent pioneering work. It illuminates an often unnoticed area of picture books in the US, especially for those readers who keep an eye only on popular hits and marginalizes all other works as demographically and critically unimportant. Abate successfully demonstrates not only the inherent merits and failures in these picture books but, more importantly, she reveals them to be far more significant than as generally supposed. They fill a large area of empty space of demand in the market left by mainstream mass-audience works, reflect the climate of national political climate and encompass new future possibilities of picture books. In this sense, Abate's work deserves unreserved warm recommendation, especially for researchers in picture books, for those who want to get a fuller picture of the current state of picture books in the US, for those who are interested in the niche market, political underpinnings of picture books, or for general readers of children's literature criticism. As its title suggests, it treats small niche books, but it touches on a much bigger view.

The history of the chairs of education in the German speaking universities

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ABSTRACT: The articles presents the fourth volume of Wolfgang Brezinka's monumental history of academic theory of education and pedagogy. This last volume deals with Vienna University of Economics (Wirtschaftsuniversität Wien) and therefore the chair of economics and commerce education, and the University of Klagenfurt, with the controversial attempt to build there a leading centre of educational research and training in the Seventies. More than 800 pages are dedicated to these cases, but the last 150 pages of the book, where Brezinka draws the final synthesis of the four volumes are to be seen by all historians of university. Here he provides also a comparative picture of German and Swiss chairs, showing similarities and differences. The close link with religion first and philosophy then; the State school and university policies; the changes in the Seventies, with the student boom and the shift from *Pädagogik* to educational sciences; the hyper specialization and fragmentation of education in many topics; the relationship between university educational theory and school teachers' needs are critically examined.

EET/TEE KEYWORDS: Academic pedagogy; History of University; Austria; Germany; Switzerland; XXth Century.

This substantial fourth volume¹ completes the monumental task, embarked upon twenty years ago by Wolfgang Brezinka, of reconstructing the history of educational theory and pedagogy in the German-speaking universities of the Habsburg Empire (from their inception during the reign of Empress Maria Theresa up to 1918) and subsequently of Austria, from 1919 up to 2010.

¹ W. Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert. Band 4. Pädagogik an der Wirtschaftsuniversität Wien und der Universität Klagenfurt. Abschließender Überblick und Bilanz*, Wien, Verlag der Österreichischen Akademie der Wissenschaften, 2014.

Brezinka's methodological approach, as remarked in my reviews of his first three volumes² is to provide a predominantly institutional history that traces developments in individual professorships, institutes, doctoral theses, and habilitation theses; yet neither does he hold back from assessing the contents of the evolving pedagogical disciplines.

The earlier volumes examined the Universities of Vienna (2000), Prague, Graz, and Innsbruck (2003), and Czernowitz, Salzburg, and Linz (2008). The fourth volume presents the Vienna University of Economics (*Wirtschaftsuniversität Wien*) and the University of Klagenfurt.

The first section of the fourth volume (pp. 6-184) outlines the history of economics and commerce education (*Wirtschafts-und Handelspädagogik*) and its key role in the training of teachers for the *Realschulen* and business schools, who had long gone without any pedagogical training. The author begins his overview in 1770 with the founding in Empress Maria Theresa's Vienna of the *Real-Handlungs-Akademie*. He then works his way up to the establishment of the Vienna University of Economics and Business in 1898, where only in 1951, with the inaugural professorial appointment of economics education pioneer Hans Krasensky, was this discipline finally accorded institutional status. In 1971, Krasensky was succeeded by Wilfried Schneider, who remained as chair until 2004. Meanwhile, the year 1968 saw the setting up of a Chair of educational theory initially assigned to Walter Schöler that provided the epistemological foundation for economics education. However, the two disciplines were allocated to different institutes. The author then details all seven habilitations (1950-2007), four in economics education and three in educational theory (*Allgemeine Pädagogik*) (including that of Peter Posch in 1975) completed at this university.

Almost 600 pages of the book (pp. 195-800) are devoted to the University of Klagenfurt and its controversial history. Along with Salzburg and Linz, Klagenfurt succeeded in getting a university of its own as a result of sustained political and cultural pressure. In 1964, the Carinthian University League was founded, in a region of little over half a million inhabitants. At the time, there were only two chairs of educational theory in the whole of Austria, one in Vienna and one in Innsbruck, where Brezinka himself was appointed full professor in 1960, aged 31 years, following on his habilitation at 26 years of age when he took up a teaching post in Würzburg. In 1962, he began to petition the Ministry of Public Education to set up a new centre for educational research, to be located in Innsbruck. Despite receiving support from the Ministry, which was favourable towards the establishment of new chairs in pedagogy, the plan did not come to fruition due to resistance from the faculties of philosophy, which, including that of Innsbruck, rejected the institution of new chairs in

² See «History of Education & Children's Literature», vol. 1, n. 2, 2006, pp. 389-397; vol. 3, n. 2, 2008, 2, pp. 441-446.

1964. In 1967, Brezinka accepted a post at the new University of Konstanz, where he continued his career until he reached emeritus status. Krasensky on his part argued in favour of opening an institute of economics in Klagenfurt in 1965, but this proposal found little favour with the ministry, on the grounds that sufficient resources were already available through the universities of Vienna, Linz, Graz, Innsbruck.

In contrast, the idea of setting up at Klagenfurt an empirical educational research and teacher training centre was even put forward and authoritatively argued for in Germany by experts such as Otto F. Bollnow, who however were not fully familiar with the situation in Austria. The Austrian academics were generally of the view that the cost of the proposed new centre was too high and that there were not enough academics available to teach there. Ralf Dahrendorf, who had planned the University of Konstanz, also weighed in with a negative opinion. Brezinka himself, despite having originally supported demands for Austria to have its own centre of advanced research in teacher education, now opposed the new scheme from Konstanz, arguing that it was unclear whether the proposed centre was primarily intended to conduct research, offer teacher education, or formulate school policy.

Nevertheless, in 1970, the Klagenfurt Higher Institute for the Educational Sciences (*Hochschule für Bildungsforschung*) became a reality. It was conceived as a research centre of excellence in the field of the educational sciences which intersected with didactics, psychology, sociology, economics and philosophy, among other humanistic disciplines. This tension among multiple disciplines on the one hand and educational research on the other led to internal conflict, which was worsened by the polarization of political views among academics in the aftermath of 1968.

In 1975, the institute changed its title to Klagenfurt University for the Educational Sciences. However, this did not lead to an improvement in the situation. The ministry had planned to establish 23 new chairs in 1973, but lacked qualified professors to fill them. Most of the students specialized in foreign languages, history, and philosophy, rather than education. Furthermore, the demand for teachers in Austrian secondary schools had fallen quite strongly at that time, so that graduates' employment prospects were poor. Other courses of study, such as information technology and economics, were introduced and attracted a higher number of enrolments, so that in 1993 the university changed its name once again, becoming simply the University of Klagenfurt, with a faculty of humanistic studies and a computer science and economics faculty. In 1985, Klagenfurt employed 10 full professors of education and one adjunct professor, divided among four university institutes. Six of these were not replaced when they retired. Conflict among the academic staff, and the less than excellent quality of the university's scientific production, as evaluated by the Education Ministry, did not help matters. The ambitious initial plan to develop a leading centre of educational research and training at Klagenfurt

failed, and indeed was never accepted by the other Austrian universities. The university became a teacher education college of modest dimensions with a correspondingly small student body, but not a research centre of excellence. The exception to the rule is the history of education discipline, of which Klagenfurt boasts the only chair in Austria and in which Elmar Lechner, Gerlad Grimm, Erik Adam have produced research of acclaimed value. In 2004, the university took on its most recent title of Alpen-Adria-Universität Klagenfurt.

The last chapter of the book (pp. 803-949), in which the author draws the conclusions of his vast work and offers a final overarching analysis, represents crucial reference material for all those with an interest in the theme of education as a university discipline, not just in Austria, but in a broader region of Europe, thanks to the inclusion of key sections on the evolution of professorships in pedagogy and education in Germany and Switzerland over the past 200 years.

Concerning his main focus on the Habsburg Empire and later Austria, Brezinka distinguishes between three main periods: 1. The setting up of the chairs in practical education (*Erziehungskunde*), which were imposed by the *Politische Schulverfassung* of 1805 and dominated by the educational theory of Vincenz Eduard Milde. These professorships remained in existence until 1848. During this period, the Habsburg Empire was at the forefront of developments in European pedagogical science. The centralized administration system run by the *Studienhofkommission*, the precursor of the Ministry of Education, facilitated the harmonization of school and university policy throughout the Empire. Though only taught for two hours a week over two semesters to students of theology, private tutors, and secondary school teachers, Milde's pedagogy – obligatory in all the Empire's universities – offered sound theoretical and practical features. Firmly based on the end-means distinction and ethically oriented, Milde's thinking bore the influence of late Josephinism and was entirely aconfessional; indeed, it was informed by Kant's *Selbstbildung* and the educational theory of August Hermann Niemeyer (who succeeded his great-grandfather A.H.Francke as director of the Halle schools). With a strong emphasis on practical, teaching-learning, and educational outcomes, it catered for the needs of future teachers (which many priests of the day were destined to be), and hence was a mandatory course of study for aspiring clerics. The 1848 revolution and Minister Leo Thun-Hohenstein's reform of schools and universities brought the teaching of educational theory at universities to an end and ushered in alternative cultural models, among which the Hebartian model was the most prominent.

The second key period (1865-1964) was that of philosophical pedagogy (*Pädagogik*). For secondary teachers, it only became compulsory to attend courses in *Pädagogik* in 1897, while the requirement for them to take an oral exam in adolescent education and psychology was introduced far later still, in 1928. In contrast, pedagogy was a key component in the education of primary teachers, and it was on the head of pressure from school teachers, school

inspectors and politicians that it was reintroduced as a university discipline: this came about in 1871 under T.Vogt in Vienna and under the Polish professor, E. Czerkawski, in Lemberg, Galicia; in 1872 under O.Willmann in Prague and in 1882 under G.A. Lindner: four chairs in pedagogy that remained active right up to the end of the nineteenth century. In Hungary, a new chair of *Pädagogik* had already been set up in 1870 and assigned to A.Lubrich, while 1872 saw the introduction of the discipline at the University of Klausenberg and 1894 in that of Zagreb. In 1904, Eudard Martinak was invited to the University of Graz, where he became full professor of pedagogy in 1909. In that year, *Pädagogik* was an independently taught discipline only in Prague and Vienna, given that elsewhere it fell under the chair of philosophy. On the collapse of the Habsburg Empire in 1918, pedagogy was represented in Austrian universities through the chairs of Vienna and Graz only.

In this second period, pedagogy was closely linked with philosophy, which at the time also included psychology. Even among university professors, there was considerable prejudice against *Pädagogik*, perceived as less scientific than philosophy, history, or the classics. Of the eleven professors of *Pädagogik* who taught in Austria up to 1960, none had personally graduated with a thesis in *Pädagogik* and only two had written their habilitation theses on pedagogical topics (T.Vogt in Vienna and W.Toischer in Prague). Hence, these professorships were assigned to academics who had specialised in other subjects (philology, mathematics, philosophy, natural sciences). On the other hand, this ensured that they had a well-rounded academic background; furthermore, these early professors were often former secondary teachers, because classroom experience was viewed as a fundamental prerequisite for teaching pedagogy. Influenced by the thinking of Herbart, Stoy, Rein and Ziller amongst others, the first chairs in *Pädagogik* focused on the needs of schools and set up teacher training colleges. However, although the Habsburg Empire was well-endowed with teacher training institutes, journals for teachers, libraries for teachers, and teachers' associations, it lacked – according to Brezinka – a fully circular exchange between pedagogy outside of academia and pedagogy in universities, with the latter failing to systematically classify and evaluate the many pedagogical works in circulation that were of variable scientific worth (p. 846).

The third period began in the mid-1960s and coincided with a shift in terminology, with the term *Erziehungswissenschaft*, or educational science, coming to replace *Pädagogik*, in line with a broader trend shared by many European countries. In the 1960s in Austria, the call came from many quarters to reinforce the chairs of *Erziehungswissenschaft*, which had by then become completely inadequate to the task – now perceived as crucial at the political level – of training primary and secondary school teachers. In 1965, there were still only five chairs of educational theory at the country's universities, but by 1997 this figure had risen to 28, with an additional 14 professorships in the economics, sport, and religion education, yielding a total of 41 professors

plus the assistant professors, whose number was also growing prodigiously. In parallel, the number of students specializing in educational science was also rising fast, thanks to the introduction of new degree courses (from 117 students in 1964/65 to 7,986 in 1997/98) (p. 828). This expansion, which encompassed the earlier mentioned attempt to launch a centre of pedagogical excellence at Klagenfurt, is not judged very positively by the author. The increase in quantity was not matched by corresponding advances in quality, due to the scarcity of scholars with a sufficient background in educational theory. In other words, the growth spurt happened too fast. In 1965, the University of Vienna organized nine cultural events/seminars for its student teachers, while in 2000 it launched 204 of them, for the most part delegated to assistant academic staff (p. 848). The rise in student numbers meant that academic staff were obliged to spend a large proportion of their time supervising their students' theses, leaving far less scope for them to cultivate relations with schools. Assistant academic staff were required to publish scientific works. Few of those qualifying for positions as university professors of educational science had significant school teaching experience behind them, because the emphasis was now on initiating a research career as early as possible.

Hence, during the first phase identified by Brezinka, the core themes of education and general didactics had been systematically addressed by Milde. In the second phase, the training of secondary school teachers revolved around general pedagogy, the history of education, and didactics; the dissertations of university students displayed a similar focus. In contrast, from the 1960s onwards, new fields of specialisation began to emerge: family education, childhood education, school education, social education, business and work education, adult education, special education, comparative education, and subject-specific didactics. These branches of educational knowledge gradually became fragmented into a series of micro-disciplines, many of which were in the area of didactics (the teaching of media literacy, educational technologies, the didactics of ongoing professional development, ecc.). Some of these subdisciplines were highly specialized and some of questionable scientific value: educational theory, in the name of becoming more interdisciplinary, took up themes and objects of enquiry that did not properly belong to it, generating research that was more descriptive than foundational. The broadening of horizons was positive, but the acritical adoption of themes and methodologies from outside the discipline did not give rise to significant scientific progress.

The last thirty years of the twentieth century were also marked by increasing confusion in terminology. Degree courses that were similar in content were given different titles. The term «pedagogy» (*Pädagogik*) was replaced by two different expressions for «educational science»: (*Erziehungswissenschaft*), (*Bildungswissenschaft*) or both (*Erziehungs- und Bildungswissenschaft*). In German, *Erziehungswissenschaft* refers to education/training in skills/competences, whereas the second evokes the idea of «formation of the person».

It also became fashionable to make widespread use of English-language terminology, even when equivalent terms were available in German. Some highly unclear labels came into use, such as: «generative science» or the «hermeneutics of human possibility» (pp. 854-855). This confusion and disorientation was reflected in the titles of the doctoral and habilitation theses from these years (pp. 858-860). The discipline was losing its specifically pedagogical focus.

Brezinka points out, in his introduction to the volume, that this process led all too frequently to neglect of the core dimensions of pedagogical reflection – i.e., the theory of education, the philosophy of education and the history of education – in favour of fields that in reality had nothing to do with educational science. Austria's tradition of recognising the importance of educational science and making (limited) room for it in academia, which predates that of other European countries, thus came to be largely forgotten (p. IX). The thinking of great authors was abandoned in favour of pseudo-disciplines treating marginal themes.

Today it would likely be impossible to put together an encyclopaedia of educational knowledge due to the vast quantity of information available, which imposes specialisation. Brezinka criticises neither specialization nor the broadening of scope and perspectives. Rather, he takes issue with the fragmentation of educational knowledge and its dispersion across micro-themes that are often addressed using cryptic language and have no practical impact vis-à-vis the everyday needs of the educators and teachers.

The final sections of the volume are devoted to a useful comparison with the situation of *Pädagogik* in Germany and Switzerland. In Germany, the first ever chair of education (and philosophy) was assigned by the Prussian government to E. Ch. Trapp at Halle in 1779, but without the approval of the Pietist theological faculty, so it remained operative for only three years. Subsequently, it fell to Niemeyer, a professor of theology, to lecture in education. The chair of philosophy and education was not to be reinstated at Halle University until 1915. As in the Habsburg Empire, education was taught to theologians, pastors, secondary school teachers, and tutors, and lectures were delivered by professors of philosophy, such as Kant in Königsberg, Herbart in Göttingen and Königsberg, and Schleiermacher in Berlin. Educational theory was to remain tied up with philosophy – as opposed to a stand-alone discipline – over the long term. Even the Herbartists, despite enjoying quite a following abroad, never succeeded in obtaining academic recognition for their discipline at home. T. Ziller, a former secondary school teacher, lectured in education at Leipzig University. His successor, H. Masius, was appointed professor of education, but subsequently L. Strümpell was only made honorary professor. In Jena, K.V. Stoy too remained an honorary professor for the duration of his career. He was succeeded by W. Rein who was made adjunct professor in 1886 and only attained the status of full professor in 1920. After Rein, the professorship passed to P. Petersen, who as early as 1923 had its title changed

to chair of «educational science». However, this change of terminology did not correspond in practice to a distancing of the discipline from the philosophy of education. In Germany, the institutionalisation of education at Jena remained an exception: everywhere else, education continued to be joined to the chair of philosophy until the mid-twentieth century. In Berlin, for example, F. Paulsen was invited to take up the chair of philosophy and education in 1878. Himself trained as a philosopher, Paulsen believed that if separated from philosophy, education would lose its roots. He devoted himself to studying the history of German schools and universities, producing a major work that is still a point of reference today. One of his students was E. Spranger, who graduated under his supervision. and in 1909 went on to take up a post as lecturer in Berlin. In 1911, Spranger succeeded E. Meumann as professor of philosophy and education in Leipzig and in 1920 returned to Berlin, where he founded a teacher training college some 43 years after Vogt had opened his in Vienna. Only in 1945 did Berlin finally obtain a stand-alone chair of education, while in Munich this post was announced in 1913 and filled in 1914 by F.W. Foerster. Similarly, Frankfurt appointed its new professor of education in 1916; this was J. Ziehen, a former secondary school teacher. In the pre-1919 period in Germany, as in the Habsburg Empire, university lecturers and professors of education typically had a background in philosophy, philology, history, psychology, sociology, or science. Few of them wrote their habilitation theses on a pedagogical topic (eight out of 21) (p. 883). More than half were former schoolteachers. During the Weimar Republic, the number of chairs in education grew sharply, rising from 31 to 79 between 1920 and 1932, reflecting the need to staff the new primary teacher training programmes at the Universities of Jena, Leipzig, Dresden, Braunschweig, and Hamburg. However, in 1945, the number of professorships had fallen once more to 38, due to early retirements, redundancies, and emigration during the years of Nazism. Education's links with psychology strengthened to the detriment of its prior link with philosophy, and it began to take a more empirical turn.

In Germany too, the institutionalisation of educational theory went hand in hand with the appointment of new chairs to supervise the university training of teachers and, from the 1970s, to deliver undergraduate courses in educational science. The professors of education numbered 14 in 1953, 196 in 1966 and 1,054 in 1983 (about half of whom were full). This huge increase was achieved by assigning professorships to young candidates who did not always have a strong background in educational science. Meanwhile, the students enrolled on education courses went up from 1,024 in 1966 to 36,719 in 1983. (pp. 888-889). Most educational science students were and are women. Over the 1980s and 1990s, the number of chairs declined once more. In 2006, there were 843 professors.

The large number of German professors of educational science precludes in-depth analysis of their individual careers, such as that conducted by Brezinka

for the Austrians. With regard to the contents of the educational theories taught at German universities, Brezinka is equally as harsh in his judgment as in the case of Austria: German *Pädagogik* too, he concludes, has become fragmented, complicated, open to all sorts of questions, and devoid of practical impact. It is now a multidisciplinary field that has lost its theoretical and historical bearings and there is no longer broad consensus concerning the aims and key questions of education.

In Switzerland also, *Pädagogik* remained associated with philosophy within universities up to the middle of the last century. In Zurich, the 1897 appointment of E. Meumann, W. Wundt's pupil and collaborator at Leipzig, led to advances in empirical/experimental educational research. In Geneva, the chair of education was founded in 1890, and was complemented in 1920 by a professorship in experimental education. The appointments of E. Claparède and J. Piaget to the chair of psychology brought international fame to the French-speaking university.

The development of *Pädagogik* as an academic discipline bears many similarities across Austria, Germany and Switzerland. The bibliography for this volume draws heavily on the German-language literature up to the 1970s, when the influence on educational science of psychology, sociology and philosophy prompts the citing of more English-speaking scholars. In Switzerland, there is a traditionally strong interest in the history of education and educational thought (J. Oelkers, F. Osterwalder). In none of the three countries did the increase in the number of professorships that came about in conjunction with the introduction of new degree courses and specific university training for primary and secondary teachers, result in superior quality scientific production, which on the contrary has become too prolific even by the new standards for academic assessment. The search for new themes has moved away from the core of the pedagogical reflection, producing writings that make no meaningful contribution to solving the concrete problems faced by educators and teachers: this is the author's final assessment.

Thus, Brezinka concludes with this fourth volume his in-depth analysis of the history of *Pädagogik* in Austrian universities, representing some 20 years' work. In so doing, he provides us with a key reference work that draws on a vast bibliography and multiple archival sources, as well as on the author's personal experience.

His evaluation of the work of individual scholars in the field of education is informed by his own pedagogical perspective. In this fourth volume as in its predecessors, he does not shrink from criticizing many of his colleagues who are still living. This has led him to receive critical reviews in Germany (J. Thonhauser)³ along with other positive reviews, for example in Hungary

³ See «Zeitschrift für Bildungsforschung», vol. 5, 2015, pp. 113-120.

(Beatrix Vincze)⁴ and Croatia (and Štefka Batinić)⁵ in addition to the previously published reviews on the earlier volumes.

While it is understandable that Brezinka's judgements of fellow scholars, which in some cases are unsparing, may not be shared or appreciated by all, his remains a powerful analytical work offering a panoramic view of education as an academic discipline in a large region of Europe, and inviting others to conduct similar analyses for other parts of the continent, based on the awareness that only a historical reconstruction will allow us to properly evaluate the current state of European pedagogical reflection.

⁴ See «Pedagógia történeti Szemle», vol. 1, n. 4, 2015, pp. 95-101.

⁵ See «Annals for the History of Education», vol. 13, n. 13, 2015, pp. 165-167.

Nuove piste di ricerca per la storia della letteratura per l'infanzia: a proposito di un recente volume*

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New research paths for the history of children's literature: about a recent volume

ABSTRACT: This critical note focuses on four aspects of this recent volume, considered fundamental and foresight of further developments: on the one hand, the interpretation of the history of children's literature as a history of non-formal education processes; on the other hand, the study of children's literature in translation and its editorial fortune; finally, the study of children's religious literature.

* Tutti gli interventi raccolti in questo contributo hanno quale punto di partenza per la loro riflessione storiografica il recente volume A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, Milano, FrancoAngeli, 2017, vol. 1.

EET/TEE KEYWORDS: History of children's literature; Non-formal education; Literary translation; Religious literature; XIXth Century.

Juri Meda

La storia della letteratura per l'infanzia come storia dei processi di educazione non formale

Il primo volume della recente storia e antologia della letteratura per l'infanzia italiana dell'Ottocento costituisce la prima parte di una più complessiva storia della letteratura per l'infanzia nell'Italia del XIX e del XX secolo destinata a completarsi con la pubblicazione, in tempi brevi, di altri due volumi.

L'opera intende rispondere a due differenti esigenze, tra loro strettamente correlate: quella di mettere a disposizione dei lettori un'ampia raccolta antologica di testi, debitamente introdotti e commentati, relativi ai diversi generi e filoni che hanno caratterizzato la produzione letteraria per l'infanzia nel corso degli ultimi due secoli; e quella di fornire loro, nel contempo, una ricostruzione d'insieme delle principali tappe e dei molteplici fattori e processi di sviluppo che hanno contrassegnato l'evoluzione di questo peculiare ambito letterario nel corso della lunga e complessa fase storica che dagli albori del secolo XIX giunge fino alla seconda guerra mondiale. Dopo aver ricostruito i precedenti settecenteschi e sottolineato l'influsso esercitato sulla nostra nascente letteratura per l'infanzia da quella straniera (in particolar modo francese), il volume pone a tema il ruolo esercitato da *Il Giannetto* (1837) di Luigi Alessandro Parravicini nella costituzione del 'canone della letteratura per l'infanzia' ottocentesca e le scelte operate – in conformità ad essa – dai numerosi scrittori per l'infanzia che operarono tra l'età risorgimentale e la prima stagione post-unitaria. Completano l'opera tre ampi capitoli dedicati, rispettivamente, a quella che è stata definita la «letteratura per l'infanzia fra i banchi di scuola», ossia ai libri di lettura adottati nelle scuole elementari all'indomani dell'unificazione nazionale; alla letteratura per l'infanzia di matrice confessionale, ovvero al variegato settore delle opere di tipo catechetico, agiografico e devozionale precipuamente rivolte a fanciulli e ragazzi e incentrati sulle tematiche dell'educazione morale e religiosa; e, infine, alla circolazione e fortuna, nell'Italia dell'Ottocento, dei grandi autori stranieri e dei 'classici' della letteratura per l'infanzia internazionale.

Proprio su questi tre inediti capitoli della storia della nostra letteratura per l'infanzia, scarsamente presi in considerazione dalla precedente storiografia di settore, si concentra la presente nota critica.

Superando da un lato gli schematismi della storia letteraria e dall'altro lato le limitazioni imposte da una interpretazione della storia dell'educazione come mera storia dei processi di educazione formale, il libro analizza la letteratura infantile non solo come strumento di alfabetizzazione primaria e forma di

intrattenimento culturale, ma anche come strumento di educazione non formale utilizzato in una società – come quella borghese ottocentesca – caratterizzata da un progressivo sviluppo dei consumi culturali infantili al fine di trasmettere determinati codici morali. Se infatti, per un lato, la letteratura per l'infanzia penetra all'interno dei contesti educativi formali e – come notano gli autori – prende il proprio posto anche sui «banchi di scuola» con i libri di lettura adottati nelle scuole elementari italiane, dall'altro essa viene utilizzata per uniformare l'infanzia italiana a un determinato universo di valori anche al di fuori del contesto scolastico, come testimoniato – ad esempio – dalla letteratura per l'infanzia di matrice confessionale, ma anche dalla stampa periodica per l'infanzia, che sarà vieppiù utilizzata a cavallo tra i due secoli per promuovere processi di nazionalizzazione.

Questi processi di riproduzione culturale messi in atto dalle classi dirigenti nazionali entrarono in crisi quando i giovani lettori iniziarono a rivendicare maggiore libertà di scelta nella definizione dei propri consumi culturali. In sostanza, fino a quando furono esclusivamente genitori ed educatori a scegliere le letture da proporre ai propri figli e allievi, autori ed editori proposero loro libri che incontrassero i loro gusti e che rispondessero agli intenti educativi che quelli si proponevano di raggiungere, in modo tale da vendere i propri prodotti; mano a mano però che i giovani lettori rivendicarono una maggiore autonomia nell'acquisto dei propri beni di consumo culturali, autori ed editori – per mantenere il regime di vendite precedente e anzi aumentarlo, dato che nel frattempo il numero dei minori alfabetizzati era sensibilmente cresciuto – furono costretti a cambiare e ad adeguarsi sempre più a ciò che piaceva ai propri consumatori finali, in cerca di diletto, senza più il necessario placet di genitori ed educatori. Questo fenomeno arriverà alle proprie estreme conseguenze tra gli anni Trenta e gli anni Cinquanta, quando i periodici per ragazzi saranno invasi dai fumetti avventurosi di matrice americana, i quali costituirono senza dubbio la punta più avanzata del processo di liberalizzazione del mercato culturale infantile, con il risultato dell'ultimo grande sollevamento popolare in tema di letteratura per l'infanzia, guidato non a caso da famiglie ed educatori, che metteranno all'indice questo genere paraletterario proprio per l'assenza di un preciso orientamento morale e per la cessione unicamente alle pulsioni ricreative. Questo momento costituì solo il culmine di un processo che – come questo libro mostra efficacemente – ebbe inizio anni addietro.

In tal senso, la letteratura e la stampa periodica per l'infanzia evolvono nel corso del XIX secolo sulla base, da un lato, del processo di emancipazione dei propri consumatori dall'autorità e dall'ascendente esercitati dagli adulti (fossero essi genitori o educatori), e dall'altro, dell'evoluzione dei loro gusti. I giovani lettori rifiutarono il semplice ruolo di consumatori coatti di prodotti editoriali finalizzati alla codificazione etica dei loro comportamenti e divennero liberi consumatori culturali, lettori dotati di un proprio particolare gusto letterario, e – proprio nel momento in cui nell'ambito culturale europeo il romanzo e

la novellistica letteraria si sostituirono definitivamente in ambito popolare alla letteratura precettistica e a quella teatrale – iniziarono a leggere romanzi e novelle (inizialmente stranieri) pensati esplicitamente per essi e improntati a precisi canoni letterari, e anche illustrativi. Convinti anzi della centralità dell'illustrazione nella fortuna della letteratura e della stampa periodica per l'infanzia a partire dalla fine dell'Ottocento, auspichiamo che nei prossimi due volumi gli autori concentrino la propria riflessione sull'evoluzione tecnica dell'illustrazione delle opere di letteratura per l'infanzia e sull'influenza da essa esercitata sui testi e sulla fruizione di essi da parte dei giovani lettori, oltre che sulla motivazioni all'acquisto da essa determinata, anche sulla base d'una sempre più determinante rilevanza del cromatismo.

Elisa Marazzi

La letteratura per l'infanzia in traduzione

Il volume di Anna Ascenzi e Roberto Sani si configura come il primo di un'opera intesa come strumento didattico per i corsi universitari di letteratura per l'infanzia e storia della pedagogia. A integrazione di ogni capitolo critico è proposta una scelta antologica di testi, aspetto decisamente opportuno in un'epoca in cui se il docente parla del caravanserraglio di Gianburrasca, o dei racconti del maestro Perboni, di rado vede gli studenti annuire, come accadeva invece pochi anni fa. La crescita esponenziale dell'offerta di letture per i più giovani, in risposta all'aumentato potere d'acquisto delle famiglie, che risale agli ultimi decenni del XX secolo, ha fatto sì che i ragazzi nati negli anni Novanta raramente si siano trovati a leggere *Il giardino segreto* di Frances Hodgson Burnett o *I pattini d'argento* di Mary Maples Dodge, magari in un'edizione in cartonato appartenuta ai genitori o addirittura ai nonni. Il testo letterario trova infatti la sua forma in un libro, oggetto materiale in balia delle leggi di mercato, intersecate, beninteso, con altre dinamiche di carattere sociale e culturale, e nel nostro caso anche pedagogico-educative. Uno dei più significativi nodi critici del volume di Ascenzi e Sani, quello incentrato sulla letteratura per l'infanzia in traduzione, consente per l'appunto una serie di riflessioni sulle dinamiche non solo pedagogiche alla base dell'evoluzione di uno strumento educativo di cui gli storici italiani dell'educazione hanno ben colto l'importanza. Non a caso, nel secondo capitolo, *L'influsso della letteratura per l'infanzia d'oltralpe*, gli autori osservano come il successo settecentesco degli autori francesi nella nostra penisola si collocasse in un mercato «ancora molto ristretto e un po' asfittico» (p. 41) di libri destinati ai più giovani. Per la prima volta i bambini erano concepiti come lettori dotati di una loro specificità, a seguito dei complessi rivolgimenti culturali e sociali a cui aveva dato il via l'Illuminismo, che si

sarebbero poi consolidati con l'affermarsi della famiglia borghese. Ecco dunque una domanda del tutto nuova di libri per ragazzi, e la difficoltà in Italia, Paese in cui tali processi ebbero luogo con decenni di ritardo rispetto alla Francia, di rispondervi¹. Basti pensare che le *Novelle morali* di Francesco Soave (1872), a cui è dedicato il primo capitolo del volume, rappresentano uno dei pochi testi per l'infanzia in italiano circolanti prima del XIX secolo.

Come sottolineato da Ascenzi e Sani, il successo di questa prima letteratura pedagogica in traduzione si doveva alla capacità degli autori francesi di non limitarsi a dilettere i fanciulli: si impegnavano piuttosto a «promuoverne la crescita intellettuale e morale» (p. 48). I testi di Fénelon, Madame de Genlis, Madame Leprince de Beaumont, Arnaud Berquin (solo dei primi due sono proposti brani scelti) si fondavano su quel felice abbinamento che sarebbe stato poi alla base del *boom* della letteratura per l'infanzia italiana nella seconda metà del XIX secolo: il motto «istruzione e diletto» nelle sue infinite varianti, tutte fondate su una nuova interpretazione del *docere et delectare* degli antichi, avrebbe campeggiato nei frontespizi di decine di volumi.

Se nel Settecento il primato delle opere tradotte in Italia era detenuto dai francesi, sia in virtù della percepita qualità educativa dei testi, sia per ragioni di vicinanza culturale, le cose erano destinate a cambiare, come si vede nel capitolo VII (*La letteratura per l'infanzia in traduzione. I grandi autori e i 'classici' stranieri*). Per inciso, un altro autore settecentesco che godette di una fortuna incredibile in Italia sino agli inizi del XX secolo, non citato nel volume probabilmente perché non appartenente al gruppo degli «oltramontani», è il canonico bavarese Christoph von Schmid, cattolico, le cui novelle didascalico-moraleggianti, sebbene non dotate di particolari qualità letterarie, dovettero rimpolpare a costo zero le casse di diversi stampatori ed editori italiani per le ragioni di proprietà letteraria che vedremo poco oltre.

Ascenzi e Sani illustrano come sin dai primi anni dell'Ottocento gli sforzi di avviare una produzione italiana di letteratura educativa provenissero da diversi attori, dalle iniziative di matrice confessionale (cap. VI) alle società pedagogiche (cap. III) e soprattutto impegnassero le energie di educatori, insegnanti e intellettuali (Luigi Alessandro Parravicini, Giuseppe Taverna, Pietro Thouar, Cesare Cantù, Felicità Morandi, per citare solo alcuni autori di cui sono proposte pagine scelte). Tuttavia il pubblico, come è noto, aumentava, visto che la lettura non era più solo passatempo dei fanciulli della borghesia, ma dopo l'Unità avrebbe coinvolto buona parte dei bambini italiani grazie alla scuola dell'obbligo. Restano i dati sulla lenta crescita del tasso di alfabetizzazione nell'Italia postunitaria, ma occorre ricordare che a chi ottemperava all'obbligo

¹ Sul tema cfr., oltre all'articolo di S. Valeri, *La fortuna della letteratura francese per l'infanzia nella seconda metà del Settecento*, «History of Education and Children's Literature», vol. I, n. 2, 2006, pp. 173-207, citato nel volume, anche Ead., *Libri nuovi scendon l'Alpi*, Macerata, eum, 2016, che ricostruisce le relazioni editoriali franco-italiane nel XVIII secolo.

scolastico la scuola non offriva solo l'apprendimento dello scrivere e del far di conto, bensì anche un'occasione di lettura altrove molto rara. Ascenzi e Sani insistono opportunamente sulla necessità di non separare libro scolastico e letteratura per l'infanzia, specie in questa fase di «circolarità e interdipendenza» delle opere dell'uno e dell'altro genere (p. 11); del resto non lo facevano neppure gli editori che sfruttavano scuola ed «extra-scuola» come occasione di smercio dei loro libri, scolastici e non².

Gli editori, per l'appunto, furono attori essenziali nel successo ottocentesco delle traduzioni: la domanda, come detto, era in crescita, così come i libri scritti da autori italiani, ma le traduzioni potevano rappresentare un'utile boccata d'aria in un mercato ancora in buona parte asfittico. Lo ha sottolineato Maria Iolanda Palazzolo in un saggio dall'eloquente titolo *L'editore come autore*³, che individua anzitutto l'importanza delle scelte editoriali: queste rispondevano sì ai valori della classe borghese postunitaria, di cui peraltro gli editori facevano parte, ma anche a problemi di carattere economico. Le disposizioni sulla proprietà letteraria e il diritto d'autore, infatti, sebbene ormai consolidate a livello nazionale anche in Italia, ancora non beneficiavano di una regolamentazione a livello internazionale e per questo era frequente pubblicare un testo straniero senza corrispondere alcun diritto né all'autore né all'editore dell'opera originale. Una situazione che consentiva di disporre di molti testi pagando solo i costi della traduzione. Ecco spiegate le già citate edizioni del Canonico Schmid e soprattutto il successo di Jules Verne (di cui è riprodotto un brano tratto dal *Giro del Mondo in Ottanta giorni* nell'edizione Salani del 1897, pp. 282-286). Quest'ultimo, se una volta arrivato in Italia brillò di luce propria, coniugando in sé il gusto per il fantastico e l'avventuroso con l'interesse per scienza e tecnica tipico dell'ideologia borghese coeva, giunse nel nostro Paese anche grazie alle iniziative poco trasparenti di alcuni editori, almeno prima della convenzione di Berna del 1886⁴. Parzialmente diverso, sebbene ancora da approfondire, può essere il caso di Alexandre Dumas (*Il conte di Montecristo*, ed. Sonzogno 1882, alle pp. 271-282), dal momento che fu portato in Italia da Edoardo Sonzogno, l'editore italiano che aveva stabilito un canale privilegiato con la parigina *Société des gens de lettres* e che dunque corrispondeva i diritti agli autori che ne facevano parte⁵.

² Sia consentito rimandare a E. Marazzi, *Libri per diventare italiani*, Milano, FrancoAngeli, 2014, pp. 215-242.

³ Cfr. M.I. Palazzolo, *L'editore come autore. Traduzioni e libri per ragazzi*, in *Editori e piccoli lettori tra Otto e Novecento*, a cura di L. Finocchi e A. Gigli Marchetti, Milano, FrancoAngeli, 2004, pp. 72-82.

⁴ Sul tema cfr. la recente tesi di laurea di E. Crespi, *Viaggi straordinari alla riscoperta di 'Giulio Verne'. Storia editoriale tra adattamenti, apocrifi e riscritture (1869-1960)*, Università degli Studi di Milano, Facoltà di Studi Umanistici, a.a. 2016-2017, rel. prof. Lodovica Braidà.

⁵ Cfr. V. Cagninelli, *Edoardo Sonzogno rappresentante italiano della Société des gens de lettres (1872-1878)*, «La fabbrica del libro. Bollettino di storia dell'editoria in Italia», vol. 14, n. 2, 2008, pp. 9-16.

Il titolo del già citato saggio di Palazzolo ci ricorda poi che all'editore non si doveva solo la scelta del testo da tradurre, bensì anche gli eventuali tagli e riscritture, all'epoca decisamente frequenti, tanto che le edizioni italiane di opere straniere erano in realtà veri e propri adattamenti⁶. Si pensi al caso della *Capanna dello zio Tom* di Harriett Beecher Stowe (di cui nel volume è presente un brano dell'edizione Salani 1903 alle pp. 286-293), le cui traduzioni italiane finirono per oscurare la critica nei confronti dello schiavismo che aveva caratterizzato la versione originale⁷. Ecco dunque l'editore intervenire anche nella paternità autoriale di un'opera che molto spesso veniva pubblicata in italiano senza indicare il nome del traduttore/adattatore e talora neanche dell'autore originale (nell'antologia di Ascenzi Sani è interessante per la storia di genere l'esempio di *Un piccolo lord*, attribuito dall'editore Treves a Francesco Burnett – l'autrice si chiamava in realtà Frances Hodgson Burnett, ed. 1887, qui alle pp. 307-312). La pratica dell'adattamento era molto utile quando alcuni passi fossero sembrati poco adatti al lettore italiano, per ragioni pedagogiche o culturali. Si pensi alla letteratura selfhelpistica o alla divulgazione scientifica, che subiva regolarmente questi processi nelle edizioni per adulti e per ragazzi; queste ultime verranno prese in esame in un secondo volume della *Storia e antologia*, sempre dedicato al lungo Ottocento e annunciato di imminente uscita.

Alcuni testi che godevano di successo all'estero furono invece tradotti più tardivamente. Si veda il caso (segnalato alle pp. 263-264 e antologizzato poco oltre) della serie delle *Piccole donne* di Louise May Alcott, avviata nel 1868 e rivolta sin dalle origini a un pubblico di giovani lettori: l'opera, come sottolineato sempre da Palazzolo, conteneva modelli di comportamento assai difforni da quelli dei romanzi educativi italiani coevi. Non a caso i quattro volumi vennero pubblicati in italiano solo nel secolo seguente, a partire dal 1905.

In taluni casi l'editore italiano recepiva già una forma di adattamento: Ascenzi e Sani non mancano di segnalare che alcuni libri divenuti classici della letteratura per ragazzi erano in realtà nati come testi, anche discretamente impegnativi, per adulti. Si pensi ai *Viaggi di Gulliver* di Swift, che nel giro di un secolo perdettero la carica satirica e l'impegno civile dell'opera originale; quando pubblicata per i ragazzi, l'opera era spesso mutila (generalmente veniva tradotto solo il primo volume, quello con le avventure «al paese dei giganti e dei nani», come titolavano molte edizioni italiane – qui un brano alle pp. 298-302)⁸. Nel volume di Ascenzi e Sani sono citati, ma non antologizzati, anche altri autori di successo che, per

⁶ Sugli sfumati confini delle tipologie di «alterazioni» di un testo nel processo di traduzione riflettono sempre più frequentemente studi di traduttologia, tra i quali si rimanda al recente André Lefevere, *Translation, Rewriting, and the Manipulation of Literary Fame*, London, Routledge, 2016.

⁷ Cfr. Palazzolo, *L'editore come autore*, cit.

⁸ Sul tema cfr. l'esautiva tesi di dottorato di Alice Colombo, *Reworkings in the textual history of Gulliver's Travels: a translational approach*, University of Portsmouth, 2013, in corso di pubblicazione.

diverse ragioni, intrinseche o meno ai testi, fecero il passaggio alla letteratura per ragazzi: Cervantes, Scott, Fenimore Cooper, Stevenson, Dickens. Più spazio è dedicato al caso decisamente eclatante del *Robinson Crusoe* di Defoe (qui alle pp. 302-307), tanto che in francese si parla ancora di *robinsonnades* per indicare i racconti per ragazzi che in qualche modo ne rappresentano l'adattamento o l'imitazione (a differenza del concetto di *Robinsonade* tedesco che si richiama piuttosto al significato originale del testo di Defoe). In Italia il romanzo era particolarmente apprezzato per «l'esaltazione [...] del modello di vita borghese e dei valori che lo caratterizzavano» (p. 257). Un esempio di adattamento che vale la pena menzionare è quello pubblicato da Hoepli nel 1906, «fatto italiano da Pasquale Fornari»: questa precisazione non significava solo che il testo era tradotto, ma, come si legge nella prefazione: il traduttore per ottemperare alla sua «missione di educatore italiano» si era posto l'obiettivo «di *italianare* le avventure di Robinson, di maniera che il libro [riuscisse] veramente conforme agli intenti della nuova pedagogia, cioè educativo e divertente»⁹. Nella stessa collana di Hoepli, «Libri per la gioventù», era stata pubblicata anche una delle prime traduzioni italiane di racconti di Andersen, inserita nell'antologia di Ascenzi e Sani insieme al *Barone di Munchausen* di Raspe. Sono menzionati nel testo, ma non antologizzati, anche i fratelli Grimm, i cui racconti, come quelli appena citati, furono pubblicati in italiano diversi decenni dopo la prima uscita, probabilmente in ragione di scelte pedagogiche più didascaliche e anche a causa della scarsa disponibilità di traduttori per il tedesco e il danese.

La fortuna del romanzo di Defoe, peraltro il più analizzato nella sua storia transculturale¹⁰, consente di individuare alcuni problemi che permettono di aprire nuove prospettive sulla letteratura per l'infanzia, soffermando lo sguardo sulle dinamiche editoriali; dinamiche che i due autori tengono in considerazione, così come hanno fatto in altri precedenti lavori (forse un poco più di attenzione sarebbe stata richiesta nella parte antologica, in cui non è precisato il motivo della scelta delle edizioni: specie nel caso della letteratura in traduzione, in ragione delle dinamiche sopra evidenziate, scegliere un'edizione invece di un'altra può modificare notevolmente la lettura di un'opera). La prima edizione italiana di *Robinson Crusoe* fu tradotta dal francese e stampata a Venezia da Domenico Occhi. Siamo agli inizi del Settecento (i sei volumi furono stampati tra il 1731 e il 1734): Venezia rappresentava ancora per l'Italia il centro della tipografia e lo sarebbe rimasto fino a Campofornio. Altre edizioni del classico di Defoe e dei testi pre-ottocenteschi presi in esame nel volume furono date alle stampe a Roma e soprattutto a Napoli, noto centro di contraffazione libraria fino all'Unità. Al declino di Venezia corrispose, come sappiamo da Marino Berengo,

⁹ D. Defoe, *Le avventure di Robinson Crusoe. Racconto educativo fatto italiano da Pasquale Fornari*, Milano, Hoepli, 1906, p. XIV (corsivo nel testo).

¹⁰ Cfr. A. O'Malley, *Children's Literature, Popular Culture and Robinson Crusoe*, London, Palgrave MacMillan, 2012.

l'ascesa di Milano nell'ambito di quella che pian piano si avviava a diventare un'industria editoriale¹¹: non a caso le edizioni ottocentesche sono attestate nel volume come frequentemente stampate nel capoluogo lombardo. Per non parlare poi di ciò che sarebbe accaduto dopo l'Unità, quando l'editoria italiana sarebbe stata caratterizzata da quello che Giovanni Ragone ha individuato come 'polo del consumo' con sede proprio a Milano¹². Gli editori milanesi, più attenti alle dinamiche commerciali, non potevano che impadronirsi delle traduzioni per affrontare quel promettente settore del mercato rappresentato dal libro per ragazzi, che in città non era caratterizzato da una tradizione radicata quanto nei concorrenti poli di Torino e Firenze.

Parallelamente, ricordiamo che, come nel caso appena citato, le prime traduzioni italiane di diverse opere spesso non erano basate sulla versione originale, ma talvolta sull'edizione francese; questo poteva far sì che il traduttore o adattatore trasponesse, più o meno consapevolmente, un testo che si discostava dall'originale. Pertanto, dello studio della fortuna editoriale di alcuni testi, compiuto in una prospettiva transnazionale, beneficerebbe non di poco la storia del libro per ragazzi, con il risultato di chiarire le dinamiche alla base della «traslazione» di alcune opere alla letteratura per l'infanzia. Ad esempio, il successo del *Robinson* di Defoe come classico per i più giovani non si nutre solo dei suoi contenuti, ma fu influenzato anche dalla riscrittura in chiave educativo-moraleggiante (non a caso in forma di dialogo tra un padre e i figli) del *Robinson der Jüngere* ad opera di Joachim H. Campe (2 voll., 1779-80) e forse ancora di più dallo *Schweizerische Robinson* del pastore protestante Johann D. Wyss (3 voll., 1812-1828, più noto nella versione inglese *Swiss Family Robinson*). Entrambi i testi si discostavano notevolmente dall'opera originale, specialmente il secondo, che godette di grande successo in Italia spesso passando proprio per il francese (*Le Robinson Suisse* di Pauline Isabelle de Montolieu fu pubblicato in italiano in molte collane per ragazzi). Ecco dunque l'importanza di ricordare che la già citata edizione veneziana del 1731-1734 non era pensata per i più giovani: a inizio Settecento quel tipo di pubblico non veniva preso in considerazione. Le prime edizioni per ragazzi del *Robinson Crusoe*, stampate a Milano, risalgono invece agli anni trenta dell'Ottocento (pp. 257-258): la trasformazione del classico di Defoe in libro per ragazzi si era compiuta anche grazie alla circolazione internazionale dei due adattamenti in tedesco ed era stata nel nostro Paese.

Un altro degli innumerevoli esempi di fortuna transnazionale, tutti ancora troppo poco indagati rispetto alle *robinsonnades*, è segnalato nel volume di Ascenzi e Sani: i testi raccolti da Berquin nei suoi *Ami des enfants* e *Ami des*

¹¹ Cfr. M. Berengo, *Intellettuali e librai nella Milano della Restaurazione*, Torino, Einaudi, 1980.

¹² G. Ragone, *Un secolo di libri. Storia dell'editoria in Italia dall'Unità al postmoderno*, Torino, Einaudi, 1999, pp. 20-37.

adolescents erano tratti in larga misura dal *Kinderfreund* di Christian Felix Weisse e da altre opere di scrittori pedagogici tedeschi e inglesi (p. 47). Ecco dunque che anche le edizioni italiane di Berquin veicolavano inconsapevolmente temi e idee di altra provenienza, così come per gli autori italiani l'idea del tipo di testi da dedicare ai ragazzi spesso giungeva dall'imitazione di modelli di cui a volte ignoravano l'origine. In più, i nostri autori non si limitavano al passivo ruolo di imitatori di tendenze diffuse a livello internazionale, se, come ricordato da Ascenzi e Sani, anche le novelle di Soave circolarono in lingua tedesca, inglese, francese e greca (p. 15).

Su questi problemi varrebbe dunque la pena di compiere ulteriori indagini, alla luce di questo volume che sottolinea la capacità della recente riflessione sulla letteratura infantile di arricchire una storia dell'educazione prima arroccata su teorie pedagogiche e legislazione scolastica. Ciò è stato possibile grazie a una molteplicità di approcci, che non hanno trascurato la storia letteraria, intellettuale, dei consumi culturali e delle mentalità, consentendo l'affermazione dello studio critico della letteratura per l'infanzia come strumento di indagine sul passato, in grado di far luce su tutta una serie di relazioni, non solo intellettuali, «destinat[e] a modellare ed alimentare l'universo dei comportamenti individuali e collettivi» (p. 10).

Fabio Targhetta

La letteratura per l'infanzia di matrice confessionale

La sesta sezione del recente volume di Anna Ascenzi e Roberto Sani è intitolata *Più che amena, edificante: la letteratura per l'infanzia di matrice confessionale* e offre un'interessante analisi della pubblicistica cattolica a sfondo educativo, corredata da numerosi brani antologizzati e una breve, ma esaustiva, bibliografia. Si tratta di un ampio ventaglio di opere – testi religiosi di stampo catechetico, agiografico e devozionale – finora quasi totalmente ignorato dagli storici della letteratura per l'infanzia. Una lacuna, probabilmente dettata dall'aspetto dimesso di queste pubblicazioni e dal loro modesto valore letterario, che i due autori intendono colmare, nella consapevolezza che una simile produzione possa offrire molteplici spunti alla ricostruzione dell'immaginario popolare, data anche l'ampia diffusione di queste opere, a lungo ristampate ancora nel primo Novecento.

Il novero del pubblico cui questo genere di pubblicazioni era destinato si presentava eterogeneo e comprendeva vasti strati di popolazione, dalla piccola e media borghesia urbana alla classe contadina, che più di frequente ne poteva godere in occasione di letture comunitarie. Le ricadute, in termini di trasmissione di uno specifico ethos cristiano – l'obiettivo primario di questi

testi – furono pertanto notevoli, data la loro ampia diffusione. Autori e editori non miravano infatti esclusivamente alla diffusione delle pratiche devozionali, ma alla trasmissione di valori e modelli coerenti con la visione cristiana della vita e alla formazione del buon credente¹³, inserito in una comunità nella quale ciascuno avrebbe assolto i compiti assegnati dal censo e dalla provvidenza. Si tratta di caratteristiche proprie anche della produzione scolastico educativa non necessariamente di stretto orientamento cattolico. Come già rilevato da Traniello, infatti, nel corso dell'Ottocento il patrimonio valoriale cattolico fu concepito come il fondamento etico collettivo del nascente Stato nazionale. Tradotto in chiave pedagogica (ed editoriale), questo atteggiamento si tradusse nell'utilizzo della religione sul piano dell'etica sociale, attraverso il costante riferimento al sistema di valori della tradizione cristiana preso in senso a-storico e come tale tradotto in senso comune¹⁴.

La produzione analizzata da Ascenzi e Sani, rispetto a quella «laica», presenta una accentuazione di questi tratti, oltre a un riferimento più preciso alla tradizione cristiana e a una finalità di educazione spirituale decisamente più marcata. Insomma, questa produzione è costituita non solo dal riferimento al patrimonio valoriale cattolico, ma anche dalla consapevole eredità di una tradizione millenaria, specie in termini di educazione morale e sociale.

Questo tuttavia non significa necessariamente immobilità: nel corso dell'Ottocento mutarono i termini di questo impegno educativo attraverso quella che allora venne definita la «buona stampa», le modalità e i canali di diffusione, il linguaggio utilizzato e le finalità, in parte ricalibrate in seguito all'unificazione nazionale. Si tratta di innovazioni che, a un occhio attento, si colgono anche dalla sezione antologica offerta dai due autori; un'evoluzione destinata ad apparire certamente più evidente quando sarà possibile confrontare l'analoga selezione di brani presente nei successivi tomi dell'opera.

Uno degli aspetti più manifesti nei quali è possibile misurare la citata evoluzione nel corso del XIX secolo è relativo alla lingua. Nei testi antologizzati, infatti, il registro utilizzato è piuttosto arcaico; inoltre, per quanto riguarda gli aspetti fonologici, perdurano le forme di elisione e di troncamento e, nel complesso, non si registra ancora l'abbandono di *pei* (*pe'*) in favore di *per i* e neppure quello di *col* invece di *con il*. Quanto alla morfologia, bisogna registrare la persistenza della forma priva di labiodentale (*parea*, *venia*, ecc.) e la permanenza dell'antiquata forma in *veggo*. In breve, la lingua utilizzata in questi brani rimanda a un modello arcaico, ricca di forme lessicali sostenute; in

¹³ Cfr. A. Dordoni, *I libri di devozione dell'Ottocento (con particolare riferimento alla produzione milanese): proposte per una lettura critica*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. I, 1994, pp. 59-102.

¹⁴ F. Traniello, *Religione cattolica e Stato nazionale. Dal Risorgimento al secondo dopoguerra*, Bologna, il Mulino, 2007, in particolare il capitolo intitolato *Mondo cattolico e cultura popolare nell'Italia unita* (pp. 193-219).

una parola, è un linguaggio lontano da quello parlato dalla grande maggioranza della popolazione italiana negli anni a cavallo dell'unificazione nazionale.

Una notevole evoluzione di questo modello – pur nella continuità di poche scelte fonologiche antiquate – si può notare nelle pagine tratte da un volumetto stampato nel 1879 dalla Tipografia salesiana e composto da don Bosco¹⁵. In questo caso, la lettura risulta facilitata da una scrittura piana, più semplice rispetto agli altri testi nelle scelte lessicali. Si tratta, è bene ricordarlo, di un preciso disegno del santo sociale piemontese, che fu alla base del successo delle sue opere e dell'impresa editoriale da lui stesso avviata. Al fine di permettere anche alle persone di modesta cultura l'accesso alla «buona stampa» era infatti necessario adattare la parola scritta al linguaggio dell'oralità. Per questa ragione don Bosco aveva l'abitudine di leggere a voce alta i propri scritti di fronte a persone scarsamente alfabetizzate, per poi modificare i testi sulla scorta delle reazioni registrate¹⁶.

Le riflessioni di don Bosco in merito alla necessità di semplificare la forma per rendere maggiormente comprensibile il messaggio testimoniano di una differente strategia adottata nel corso del secolo da parte di autori ed editori di opere di stampo confessionale, i quali proliferarono sulla scorta dell'ampia diffusione di quella particolare pubblicistica¹⁷. La questione, tuttavia, offre differenti angolature: appurato che questi libri ebbero una notevole circolazione, bisognerebbe capire se fossero anche letti, vale a dire se a fronte di tanti acquirenti ci fossero altrettanti lettori. Negli anni immediatamente successivi all'Unità era piuttosto ristretta la percentuale – quantificabile in circa il 9/12% – della popolazione italiana in possesso non solo dei requisiti minimi di alfabetizzazione, ma anche in grado di «capire» quanto letto. Da qui l'esigenza di semplificare i contenuti e, soprattutto, la forma dei libri pubblicati.

I canali di diffusione, poi, erano molteplici, non legati esclusivamente alla vendita in libreria. L'acquisto del «buon libro», e soprattutto il suo regalo in occasione delle principali celebrazioni religiose, corrispose infatti a partire dal secondo Ottocento a una comune pratica devozionale, quasi a un atto di fede, a prescindere a volte dalle reali capacità di lettura e comprensione. Prezzi molto contenuti, piccoli formati, brevità di pagine contribuivano inoltre a distribuire le pubblicazioni gratuitamente negli oratori, nei circoli cattolici, anche in ottica di incentivare la lettura comunitaria, nelle sale parrocchiali o nei filò. In questo senso, come è stato recentemente osservato, «per gli editori cattolici l'importante non è vendere il maggior numero di libri, ma raggiungere il maggior numero

¹⁵ *La figlia cristiana provveduta per la pratica de' suoi doveri negli esercizi di pietà per la recita dell'uffizio della B. V. de' vesperi di tutto l'anno e dell'uffizio dei morti: coll'aggiunta di una scelta di laudi sacre, pel sacerdote Giovanni Bosco*, Torino, Tipografia e Libreria Salesiana, 1879.

¹⁶ G.B. Lemoyne, *Memorie biografiche di don Giovanni Bosco*, vol. II, S. Benigno Canavese, Scuola Tip. Salesiana, 1901, pp. 270-271.

¹⁷ Cfr. G. Chiosso (ed.), *Tipografi ed Editori Scolastico-Educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003, *ad indicem*.

possibile di lettori»; nella dimensione dell'editoria cattolica, in particolar modo di quella legata alle congregazioni (salesiani, artigianelli, pavoniani, ecc.), «il successo [veniva] misurato sul metro dell'evangelizzazione più che su quello del tornaconto economico»¹⁸.

Meno evidente, anche se ugualmente percepibile all'interno del corpus di testi scelto da Ascenzi e Sani, è l'evoluzione riguardo ai contenuti¹⁹. A fronte dei citati cambiamenti interscorsi durante il XIX secolo, bisogna registrare una significativa persistenza circa i temi e, soprattutto, la pesante patina morale che li pervade, riassumibile nel titolo scelto dagli autori per la sezione dedicata alla letteratura per l'infanzia di matrice confessionale: più che amena, edificante. Il fine non era infatti quello di intrattenere – non parliamo neppure di divertire! – il lettore, quanto di educarlo, formarlo al ruolo che avrebbe dovuto rivestire nella società e nella famiglia, veicolando modelli di comportamento in linea coi valori della tradizione cristiana, oltre ai frequenti riferimenti al catechismo e alla pratica devozionale.

Gli argomenti sono quelli tipici di una produzione marcatamente precettistica qual era quella ottocentesca, non solo di matrice confessionale, fondata sulla «pedagogia dell'esempio»²⁰. Si tratta di testi spesso scritti in forma dialogica, in cui il/la giovane – dai tratti un po' naïf – destinatario/a di ammonimenti e paternali si trova a conversare direttamente con Gesù, a voler rafforzare l'autorevolezza del messaggio. Demonizzato, in senso quasi letterale, l'ozio, protagonista in negativo di svariati brani, i testi celebrano il valore del sacrificio, del lavoro, della responsabilità personale, della castità e il disprezzo della vanità, sentimento ritenuto tra i più pericolosi per l'animo femminile²¹. Ricorre, poi, il tema delle cattive compagnie, da evitare accuratamente, così come era necessario sottrarsi alla tentazione costituita dalla lettura di libri «perniciosi», a partire dai romanzi sentimentali, giudicati immorali. Figurano, inoltre, temi destinati ad avere un duraturo impatto nella produzione, anche scolastica, ottocentesca, come quello del pentimento: il complesso sistema di confessione/ammissione delle proprie mende e il conseguente purgatorio della penitenza, preludio all'assoluzione finale, cui erano sottoposti molti piccoli protagonisti di racconti presenti nei libri di lettura per la scuola elementare era

¹⁸ I. Piazza, M. Colombo, *La lettura comunitaria nell'Italia dell'Ottocento*, «Studi linguistici italiani», vol. XXXIV, n. I, 2008, pp. 62-96, in partic. p. 92.

¹⁹ Anche in questo caso, una evoluzione in senso maggiormente moderno dei contenuti è rinvenibile nella produzione salesiana riportata nell'antologia di testi.

²⁰ Cfr. il tema, declinato però sul versante dei libri di scuola (ma si tenga presente che i due filoni, letteratura scolastica e per l'infanzia, erano decisamente permeabili) in M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità d'Italia alla Repubblica*, Firenze, La Nuova Italia, 1986, pp. 36-43.

²¹ Sull'ideale della donna cattolica come emerge dalla pubblicitica ottocentesca cfr. A. Ascenzi, *Il Plutarco delle donne. Repertorio della pubblicitica educativa e scolastica e della letteratura amena destinate al mondo femminile nell'Italia dell'Ottocento*, Macerata, eum, 2009.

fortemente debitore di questa letteratura a sfondo confessionale, i cui effetti sulla produzione coeva andrebbero valutati molto attentamente.

Come si evince da questi pochi cenni, e come già anticipato, è dunque un tipo di letteratura che non lascia margini al diletto, all'imparare divertendosi. Il giovane protagonista di questi brani è quasi esclusivamente oggetto di rimproveri e raccomandazioni, espressi in un tono da dura reprimenda, coerente con il moralismo didascalico che pervade quelle pagine. Un modello destinato a mutare a partire dalla fine del secolo, contestualmente al consolidamento della strategia cattolica volta alla promozione della «buona stampa», che individuò i principali strumenti nel rinnovamento dei cataloghi e nello sviluppo di un'editoria organizzata su basi più moderne, maggiormente consapevole della propria funzione e del proprio ruolo nella società del tempo e, soprattutto, più competitiva sul mercato culturale²². Consapevoli della necessità di abbandonare l'ostracismo nei confronti delle «tecniche narrative della produzione coeva, adattandole agli intenti di divulgazione apologetica loro preposti»²³, autori ed editori cattolici sul finire del secolo aprirono la produzione a forme narrative diversificate, come il romanzo²⁴ e, soprattutto, la gran varietà di commedie, tragedie, farse e scherzi comici destinati per lo più ai teatrini parrocchiali e alle scuole confessionali²⁵. Ma questi sono sviluppi ulteriori che verranno certamente affrontati dagli autori nei due volumi annunciati a completamento dell'opera e che costituiscono ulteriore motivo di interesse per studiosi e lettori.

²² Su questo tema cfr. R. Sani, *Tra società di massa e totalitarismo fascista. Il rinnovamento dell'editoria e della pubblicistica educativo-popolare cattolica tra le due guerre* e Id., *L'editoria scolastica cattolica tra età giolittiana e ventennio fascista: il caso della Società Editrice Internazionale (SEI) di Torino e dell'Editrice La Scuola di Brescia*, ora 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. 449-495. Cfr. anche F. Traniello, *L'editoria cattolica tra libri e riviste*, G. Turi (a cura di), *Storia dell'editoria nell'Italia contemporanea*, Firenze, Giunti, 1997, pp. 299-319; F. Targhetta, *Serenant et illuminant. I cento anni della SEI*, Torino, SEI, 2008; *Cultura, religione e editoria nell'Italia del primo Novecento*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. 16, 2009.

²³ I. Piazza, *La lettura nella strategia cattolica del secondo Ottocento*, in G. Tortorelli (ed.), *Una sfida difficile. Studi sulla lettura nell'Italia dell'Ottocento e del primo Novecento*, Bologna, Bollettino del Museo del Risorgimento, 2009, pp. 159-173, in partic. p. 170.

²⁴ I. Piazza, «Buoni libri» per tutti. *L'editoria cattolica e l'evoluzione dei generi letterari nel secondo Ottocento*, Milano, Unicopli, 2009.

²⁵ Cfr. F. Targhetta, *La capitale dell'impero di carta. Editori per la scuola a Torino nella prima metà del Novecento*, Torino, SEI, pp. 165-195.

Michel Ostenc

Une réflexion finale

Ce volume est le premier tome d'une *Histoire de la littérature pour l'enfance en Italie* aux XIX^e et XX^e siècles. Les auteurs n'entendent pas limiter le sujet à la stricte acception du terme et ils insistent sur le lien étroit unissant cette littérature aux manuels scolaires. Bien qu'ils répondent à des typologies différentes, beaucoup d'extraits de romans pour enfants figurent dans les livres de lecture et nombre d'écoliers apprennent à lire en classe sur des ouvrages récréatifs. Des œuvres de grands auteurs peuvent d'ailleurs devenir littérature pour l'enfance lorsque certains extraits figurent dans les livres de classe. Les auteurs contestent le préjugé qui fait de la littérature pour l'enfance un genre littéraire mineur. Ils insistent au contraire sur son rôle dans la construction d'univers symboliques et dans l'ancrage de convictions morales susceptibles de modeler les comportements.

Après ces considérations méthodologiques, l'ouvrage s'ouvre sur les *Novelle morali ad uso dei Fanciulli* (1782) du père somasque Francesco Soave. Leurs récits servirent de lecture aux élèves des dernières classes primaires pendant des décennies. Ils influencèrent l'imaginaire de plusieurs générations en leur dévoilant les valeurs morales qui servaient à former l'homme vertueux. L'influence de la littérature française s'exerçait en Italie à travers des auteurs du XVIII^e siècle. Les *Aventures de Télémaque* permettaient à Fénelon d'évoquer une épopée romanesque inspirée de l'*Odyssée* d'Homère. Le prudent Mentor qui accompagnait le jeune Télémaque mettait fin aux aventures amoureuses du jeune homme et lui prodiguait des conseils de justice et de prudence dans les affaires de l'Etat. Directrice des pensionnats de Saint Germain et d'Ecouen, madame de Campan adaptait les programmes de Saint Cyr pour former des «femmes utiles». Son *Traité De l'éducation des femmes* affirmait la nécessité d'instruire les filles en musique, dessin, histoire et géographie. Il donna naissance à plusieurs versions italiennes, les unes s'efforçant de vulgariser le texte, d'autres lui adjoignant des conseils de morale à la manière des *Conversations d'Emilie* de madame d'Epinaï. Le «Magasin des enfants» de madame Leprince de Beaumont connut une version italienne plusieurs fois rééditée à Venise. Ce roman pour la jeunesse et son fameux conte *La Belle et la bête*, modèle de rédemption par l'amour, parut à Milan sous la forme simplifiée de dialogues entre une éducatrice et ses élèves. Les œuvres de madame de Genlis furent largement diffusées en Italie, leur succès venant de leurs contes moraux. Le roman *Adèle et Théodore*, qui invitait en 1782 les dames de l'Ancien Régime à renouer avec leurs anciennes vertus domestiques, était présenté aux lectrices italiennes sous forme de lettres sur l'éducation. L'éloge de l'amour conjugal assura la réputation de Jean-Nicolas Bouilly dans la péninsule. Son œuvre dramatique *Leonore* (1798) qui servit au livret de l'opéra *Fidelio* de Beethoven devint en Italie une série de conseils d'une mère à sa fille. Les œuvres de ces

auteurs français furent un apport indéniable pour l'éducation en Italie. La correspondance de madame d'Épinay avec l'abbé Galiani, l'un des Italiens les plus érudits de son époque, révélait un bon sens et un sérieux qui n'excluaient pas le goût de la philosophie acquis dans la fréquentation de Diderot, Rousseau et Grimm. L'interprétation italienne de la littérature française du XVIII^e siècle ne se limita pas à une éducation morale bien pensante. Elle comporta des éléments empruntés aux Lumières et à l'Encyclopédie.

La Restauration voyait émerger en Lombardie une petite bourgeoisie productive et la littérature pour l'enfance s'en ressentait. Sous l'influence d'ouvrages étrangers comme *L'Éducation progressive* de madame Necker de Saussure, l'éducation prenait en compte la pensée saint-simonienne qui faisait de l'industrie le sacerdoce des temps nouveaux; mais cette émergence d'une nouvelle classe sociale se réalisait en fonction d'une morale et de coutumes bourgeoises. Le *Gianetto* de Luigi Alessandro Parravicini (1837) se présentait comme une encyclopédie des bonnes mœurs et d'instruction civique. L'ouvrage eut un énorme succès, avec une 54^e édition en 1889. Parmi les auteurs des années 1830, Cesare Cantù s'interrogeait sur la compatibilité des problèmes posés par le Risorgimento avec les principes du catholicisme. Ses ouvrages pour l'enfance, utilisés comme livres de lecture, enseignaient les valeurs morales, le respect de la religion et de l'autorité, l'acceptation résignée de la condition sociale. Salvatore Muzzi, qui enseignait à Bologne, publiait chez Zanichelli *Cento novelline e quattro nuovi racconti* qui connurent leur 29^e édition en 1891.

Le succès de ces récits venait de la capacité de l'auteur à s'adapter au goût de jeunes lecteurs. Les *Racconti per fanciulli* (1845) de Pietro Thouar, publiés chez l'éditeur florentin Paggi, jouèrent un rôle majeur dans l'éveil d'une conscience civique et politique des nouvelles générations. Les ouvrages de Caterina Franceschi Ferrucci, inspirés de la pensée de Gioberti, voulaient promouvoir un renouveau patriotique en soustrayant la jeunesse à l'influence des Jésuites. Ils invitaient les jeunes femmes à développer leur intelligence, mais restaient imbus de fables moralisantes conçues pour de futures épouses et bonnes mères de famille [Una buona madre. Letture morali per le giovanette]. Parmi les auteurs de cette période risorgimentale figurait Felicità Morandi dont les œuvres diffusaient une image de la femme plus présente dans la société. Ses poésies *Ghirlanda di fiori per l'infanzia e l'adolescenza* (1857) se souciaient de l'adolescence féminine au travail. La sensibilité poétique de Luigi Sailer s'adaptait enfin à l'éducation des enfants. *La farfallotta* (1859) évoquait des sentiments familiaux et le rôle éducatif des adultes.

Les livres de lecture pour les classes primaires des premiers temps de l'Unité reflétaient toujours cette interdépendance entre la littérature pour l'enfance et les livres de classe. Les élites s'identifiaient à la nouvelle Nation, réservant aux masses populaires une «citoyenneté faible» constamment surveillée. Il s'agissait d'en «faire des Italiens» à travers une véritable éducation nationale. Les *Letture* de l'abbé Giulio Tarra présentaient une grande variété de thèmes fortement

imprégnés des principes d'un catholicisme modéré et de l'idéal national de la Droite historique. Ses manuels scolaires traduisaient une volonté d'imposer un modèle culturel bourgeois aux classes populaires et d'assimiler leur sentiment national à leur attachement aux institutions de l'Etat unitaire. L'Histoire dispensée en classe transformait le récit national en épopée parsemée d'épisodes héroïques et mythiques. Elle relevait davantage d'une littérature pour l'enfance que d'une véritable discipline d'enseignement. Le *Compendio di storia patria* de Giulio Tarra centrait le discours sur l'œuvre de Victor-Emmanuel et Cavour, en minimisant le rôle de Garibaldi et en passant sous silence celui de Mazzini. Dans les écoles italiennes des années 1860, les manuels d'histoire les plus répandus étaient ceux de La Farina et de Don Bosco. Le premier fut réédité jusqu'en 1873 et le second connut un succès exceptionnel avec 85.000 exemplaires et 33 rééditions en 1935. Don Bosco considérait l'Histoire comme une épreuve morale infligée à l'humanité et la papauté devenait pour lui un principe unificateur de la péninsule; mais le style pastoral de Jean Bosco fait de compréhension et d'amour de la jeunesse donnait à l'éducation morale et religieuse une dimension plus humaine mariant l'ecclésiologie vécue à l'ecclésiologie théorique. Les récits d'Ida Baccini, depuis les *Memorie di un pulcino* (1857) jusqu'au *Come andò a finire il pulcino* (1896) restaient empreints du même moralisme plein de respect pour la religion et l'ordre social. Son manuel *La Terra, il mare, il cielo* dissimulait habilement son conservatisme sous une atmosphère émouvante propice à l'affirmation de considérations édifiantes.

L'idéal catholique d'une épouse exemplaire, responsable de l'éducation morale et religieuse de ses enfants, s'exprimait dans une littérature imbue de la nécessité d'un éveil de la conscience et du discernement. Sans doute s'agissait-il d'une stratégie d'enveloppement qui dissuadait les jeunes filles d'échapper à la vie conjugale; mais cette condition qui peut nous apparaître aujourd'hui comme un esclavage n'était pas vécue à l'époque dans la passivité et la résignation. Le XIX^e siècle vit en effet s'imposer le rôle de la mère dans l'éducation des enfants et beaucoup de femmes le ressentirent comme une promotion.

L'arrivée au pouvoir de la *Gauche* d'Agostino Depretis (1876) n'entraîna pas de changement dans le système d'éducation. L'introduction de l'histoire contemporaine dans les programmes d'enseignement obéit à un objectif de formation de la conscience nationale plus qu'à un souci d'objectivité. L'optique modérée et dynastique des années 1860 s'effaça au profit d'une vision du Risorgimento plus attentive aux courants démocratiques; mais la pédagogie positiviste considérait la formation du sentiment national comme la première mission de l'école italienne. Les ouvrages s'y employaient en multipliant les références au «panthéon des pères de la patrie» et en présentant les guerres d'indépendance comme une forme de résistance à la domination étrangère. La nationalisation des classes populaires se faisait toujours à travers l'assimilation de coutumes et de valeurs bourgeoises, et le «dégrossissement de la plèbe» passait par la défense d'un modèle élitiste et hiérarchisé. Le contrôle social

exigeait l'intériorisation chez l'enfant d'une norme éthique et juridique escortée des valeurs qui la régissaient. Un thème largement utilisé concernait une fraternisation factice des classes sociales où les bons sentiments incitaient les plus aisés à renoncer à étaler leurs privilèges et les plus pauvres à se plaindre de leur misère.

Un tournant s'amorça à la fin du XIX^e siècle avec la parution du *Giannettino* et de *Pinocchio*. La découverte de l'enfant devenait le sujet d'un récit plaçant l'aventure au centre de sa psychologie. *Giannettino* était guidé par l'expérience plus que par des préceptes. Il introduisait dans l'école une nouveauté qui laissera des traces dans une Italie dominée par un idéal patriotique et paternaliste. La fascination du texte de *Pinocchio* (1883) résidait dans le merveilleux qui entourait un voyage initiatique. L'observation psychologique permettait au héros de prendre conscience de lui-même et de naître à l'humanité; mais ce modèle débarrassé de buts moralisateurs va subir des retouches destinées à l'insérer dans le moule de la formation du citoyen vertueux. Les anthologies des manuels scolaires s'ouvraient aux grands auteurs dans les années 1880. Galilée, Alfieri, Mazzini et D'Azeglio forçaient les portes d'un enseignement qui confortait ses initiations civiques et patriotiques avec les tragédies de Giambattista Nicolini et les romans historiques de Domenico Guerrazzi. Les préoccupations officielles restaient plus idéologiques que pédagogiques. La nationalisation des livres de classe s'accompagna d'une mise à l'écart de ceux qui restaient empreints d'idées religieuses. La *Storia romana* d'Edward Gibbon et la *Storia universale* de Cesare Cantù qui avaient cours dans les grands établissements d'enseignement public furent déconseillés. Il en fut de même pour l'histoire grecque de Smith et la géographie de William Latham Bevan en usage dans l'enseignement secondaire. On reprocha aux ouvrages de Pietro Thouar de séparer la formation de l'homme de celle du citoyen et les livres de lecture de Giovanni Scavia furent condamnés pour leurs références excessives à des textes d'origines confessionnelles. Ces livres ne firent leur réapparition après la publication des programmes de 1888 qu'avec des additifs ou dans des versions corrigées. Le *Sillabario* et les livres de lecture de Vincenzo Troya furent mis à l'écart, l'auteur prenant la défense d'une école fondée sur la morale chrétienne. La *Storia d'Italia dei tempi antichi, di mezzo e moderni* d'Antonio Parato subit le même sort. Bien qu'elle ne fût pas d'inspiration confessionnelle, on lui reprochait une vision chrétienne de l'éducation proche de celle de Lambruschini, Aporti et Tommaseo, et on ne lui pardonnait pas son plaidoyer en faveur de la liberté de l'enseignement doublé d'un esprit critique envers la pédagogie scientifique.

La commission de révision des livres scolaires de Giuseppe Chiarini (1894) exigea des manuels une exactitude scientifique rigoureuse respectée par les ouvrages de Raffaele Fornaciari et de Giuseppe Rigitini. La *Grammatica* d'Ida Baccini innovait en matière pédagogique par son ton intimiste plus proche des élèves que du maître et les livres de Raffaele Zeno suivaient les recommandations des programmes fondées sur l'observation et l'expérimentation. Il est vrai qu'à

la fin du siècle l'Etat se montra moins sévère, excluant les ouvrages dont le matérialisme offensait la religion aussi bien que ceux qui s'inspiraient de dogmes confessionnels. L'audience des livres de lecture dépassait les murs des salles de classe et ceux de l'inspecteur primaire Pietro Dazzi s'adressaient aux familles populaires. La progression de l'alphabétisation et les illustrations faisaient du livre de classe un «lexique familier»; mais si les moyens évoluaient l'objectif restait le même. Le conservatisme des classes dirigeantes libérales estimait toute démocratisation du corps social impossible dans un pays où une fracture trop profonde séparait le peuple de la minorité cultivée. Elles admettaient l'existence d'une classe moyenne émergente, mais entendaient la plier à leurs propres règles civiques et politiques.

Les textes religieux hagiographiques ou de catéchèse destinés aux enfants constituaient des œuvres peu connues mais largement diffusées dans les paroisses et les institutions religieuses de l'époque. La *Pia giovanetta* du chanoine Domenico Nava fut tirée à 20.000 exemplaires. Les *Vies de saints* devaient offrir au peuple un contre-modèle révolutionnaire. Ecrites dans une langue simple, elles frappaient l'imagination plus qu'elles ne stimulaient la raison et elles figuraient avec les abécédaires et le catéchisme parmi les ouvrages les plus lus jusqu'au milieu du XIX^e siècle. Les *Vies de saints* privilégiaient Louis de Gonzague, patron de la jeunesse. Elles affectionnaient aussi Philippe Neri dont la spiritualité pleine de foi dans la nature humaine était faite de simplicité et de mansuétude. Toutefois, la littérature religieuse destinée aux enfants de l'aristocratie était très différente de celle qui s'adressait aux «fils du peuple».

Ce premier tome s'achève sur un chapitre consacré aux grands auteurs et classiques étrangers de la littérature pour l'enfance. *Les Aventures de Robinson Crusoe* donnèrent lieu à plusieurs traductions italiennes de la fin du XVIII^e siècle aux années 1880. Le *Don Quichotte* de Cervantès fut publié sous diverses formes de 1831 à 1892. Le comique de Sancho Pansa et l'atmosphère du roman baignant entre le rêve et la réalité fascinaient les jeunes lecteurs italiens. Il en fut de même pour les livres de Fenimore Cooper entre 1823 et 1886. Les histoires de pionniers, d'indiens, d'aventuriers et d'îles mystérieuses ont toujours séduits les enfants. Walter Scott connut un succès considérable en Italie, lié au souffle épique de ses romans, à leur contexte historique, à l'humanité des personnages et à la vivacité des dialogues. *Ivanhoë* insistait sur des thèmes propres à séduire la jeunesse italienne au sortir de l'épopée risorgimentale: le sentiment d'appartenance à une nation, le lien unissant une communauté à un territoire et à ses traditions rejoignaient l'aspiration d'un peuple à libérer sa terre de la domination étrangère. Les *Voyages de Gulliver* obtinrent un grand succès en Italie, non seulement auprès d'un public éclairé séduit par ses critiques d'un conformisme social mais aussi auprès des jeunes fascinés par le caractère fantastique de ses voyages. La plupart de ces livres étrangers relevaient du roman d'aventure, du genre fantastique ou pathétique-sentimental. L'ouvrage d'Ascenzi et Sani accorde une mention spéciale à Louise May Alcott dont le succès

grandissant dans la péninsule s'explique non seulement par le caractère réel des personnages s'opposant aux clichés des histoires sentimentales précédentes, mais aussi par des comportements très différents de ceux véhiculés par les romans éducatifs italiens de l'époque. *La Case de l'Oncle Tom* de madame Beecher Stowe, les romans d'Alexandre Dumas et de Jules Verne connurent une énorme diffusion dans la péninsule. Ces œuvres destinées à l'origine à un public adulte, et adaptées ensuite à de jeunes lecteurs, s'accompagnaient de textes plus expressément écrits pour les enfants comme le contes de Grimm ou d'Andersen.

Ce premier volume reste fidèle à son titre anthologique en publiant de très importants extraits des ouvrages examinés; mais son grand mérite est de montrer que la littérature pour l'enfance étroitement imbriquée avec les livres de classes italiens du XIX^e siècle n'avait pas seulement pour objectif d'apporter des connaissances aux élèves et de les initier aux pratiques vertueuses. Cet enseignement devait permettre aux enfants d'intérioriser des coutumes bourgeoises assimilées à celles du bon citoyen afin de «faire les Italiens». Il était en cela éminemment politique. On attend avec intérêt la suite de cette plongée de l'histoire de l'éducation dans une approche stimulante de celle des mentalités.

Forum / Discussioni

La storia dell'educazione e della letteratura per l'infanzia in Italia tra adempimenti ANVUR e nuove prospettive di crescita culturale e di internazionalizzazione

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The history of education and children's literature in Italy between the requirements of ANVUR and the new perspectives for cultural growth and internationalisation

ABSTRACT: The text intends to discuss recent and profound changes that have characterized and influenced scientific research on the human and social sciences and the sciences of education, with particular reference to the complex knowledge and disciplines related to the scientific-disciplinary sector M-PED / 02 (History of pedagogy, History of education, History of school and Children's Literature). In particular, A. focuses on the scope and consequences of the choices made in recent years in Italy by the Ministry of Education, University and Research (MIUR) through the National Agency for Evaluation of the University System and Research (ANVUR), in the field of evaluation of research and selection, recruitment and career progression of researchers and university professors, underlining that these choices are profoundly modifying not only concrete academic strategies, but also the individual and collective imagination on research scientific education in the History of Pedagogy, History of Education, History of School and Children's Literature.

EET/TEE KEYWORDS: History of Education; Scientific Research; Ministry of Education, University and Research (MIUR); National Agency for Evaluation of the University and Research System (ANVUR); Italy, XXIth Century.

Premessa

Questo incontro¹ trae origine da un'esigenza largamente condivisa – e da più parti e in varie forme segnalata in questi ultimi anni – all'interno della nostra comunità accademica del settore M-PED/02: quella di riflettere assieme sulla situazione presente e sulle prospettive per il futuro delle nostre discipline e dell'ambito degli studi che ci appartiene (la storia della pedagogia, dell'educazione, della scuola e della letteratura per l'infanzia).

Riflettere assieme alla luce dei rapidi e profondi mutamenti che hanno caratterizzato – e stanno caratterizzando – non solo la realtà universitaria e l'istruzione superiore nel nostro Paese, ma anche gli stessi saperi disciplinari e la stessa fisionomia, organizzazione e valutazione della ricerca scientifica sul versante umanistico e delle scienze sociali (ivi comprese le discipline storiche e le scienze dell'educazione).

Si potrebbe aggiungere che questi rapidi e profondi mutamenti hanno finito per riverberarsi pesantemente non solo sui risultati, ma anche sulle pratiche e sugli obiettivi e indirizzi della ricerca stessa, condizionando pesantemente un po' tutti gli aspetti e le dimensioni del nostro lavoro.

Non a caso, si è scelto di collocare la nostra riflessione al crocevia fra la nuova situazione generata recentemente a seguito dell'introduzione dall'ANVUR (Agenzia Nazionale per la Valutazione del sistema Universitario e della Ricerca) e dal MIUR (Ministero dell'Istruzione, dell'Università e della Ricerca) di nuove procedure e di nuovi criteri e parametri di valutazione della ricerca, di segno profondamente diverso rispetto a quelli vigenti precedentemente, ed il più complessivo scenario (anch'esso scaturito – o comunque enormemente enfatizzato – dalle recenti prese di posizione dell'ANVUR e del MIUR) relativo al potenziamento qualitativo e alla cosiddetta 'internazionalizzazione' della ricerca nelle scienze umane e sociali.

In questa sede – si badi – non è nostra intenzione formulare giudizi sull'operato dell'ANVUR e sulle procedure e i criteri di valutazione che questa ha messo a punto e introdotto in ambito universitario, attraverso il MIUR, negli ultimi anni. Così come non riteniamo opportuno discutere degli eventuali pregi e difetti dell'*Abilitazione Scientifica Nazionale* (ASN) in corso o dell'esercizio di *Valutazione della Qualità della Ricerca* (VQR) recentemente conclusosi.

Le presenti riflessioni riguardano noi, la nostra comunità accademica e scientifica, e il nostro atteggiamento in ordine alle trasformazioni che sono state

¹ Il testo ripropone con qualche modifica e integrazione l'intervento introduttivo presentato da chi scrive al workshop *La storia dell'educazione e della letteratura per l'infanzia in Italia tra adempimenti ANVUR e nuove prospettive di crescita culturale e di internazionalizzazione. Una discussione a più voci*, tenutosi a Macerata il 13 settembre 2017 nell'ambito della *III International Conference on School Material Culture* dedicata al tema: *Production, Use and Circulation of School Furnishings and Teaching Aids between Europe and Latin America in XIX and XX Centuries* (Macerata, 12th-13th September 2017).

introdotte – sul versante della *ricerca* – dalle disposizioni normative e dalle procedure sopra ricordate.

Che cosa ci proponiamo di fare? Che cosa siamo realmente in grado di fare? Queste, a nostro avviso, sono le questioni chiave sulle quali è opportuno cominciare ad interrogarci.

Accettare passivamente una linea di tendenza che disarticola i nostri saperi disciplinari e il nostro settore di ricerca, svuotando tradizioni culturali e scientifiche che in passato hanno avuto una straordinaria rilevanza e hanno offerto contributi d'indiscusso valore alla riflessione storiografica e agli studi sui processi culturali?

Restringere le nostre critiche e la nostra protesta ai soli presupposti ideologici e agli aspetti squisitamente politici della trasformazione in atto, limitandoci a stigmatizzare l'ideologia neoliberista nelle sue variegate configurazioni e cullandoci nella sterile – ancorché altamente consolatoria – consapevolezza che, comunque vada, siamo nel giusto nel rivendicare il 'primato' (e la libertà) della scienza rispetto al mercato e all'economia capitalistica e nel sollecitare maggiori finanziamenti alla ricerca scientifica e alle università ecc.?

Oppure, provare ad andare oltre la scontata critica culturale, la facile polemica ideologica e la sacrosanta (ma forse poco efficace) censura politica per delineare assieme un *modus operandi* in grado di agire su istituzioni, costumi, procedure, mentalità e pratiche individuali e collettive al fine di limitare, se non addirittura neutralizzare in tutto o in parte gli effetti più negativi e le conseguenze più gravi e destabilizzanti dei mutamenti in atto?

1. *Per una fenomenologia dei mutamenti in atto sul versante dell'organizzazione e gestione della ricerca scientifica e della formazione e reclutamento dei ricercatori*

Come si è già avuto occasione di sottolineare in altra sede², soprattutto in ragione delle politiche ministeriali e delle normative introdotte dall'ANVUR in materia di valutazione della ricerca e di selezione e reclutamento dei ricercatori, si è registrata in questi ultimi anni un'ossessiva attenzione a soddisfare "mediane", a raggiungere "soglie", a rientrare in determinati parametri, a sottostare a specifici indicatori bibliometrici o di altra natura, a possedere una serie di estrinseci e un po' estemporanei criteri aggiuntivi (premi, presenza o meno nei comitati editoriali di collane o riviste, partecipazione e/o direzione di

² Cfr. R. Sani, *La ricerca educativa tra tradizione e innovazione*, in G. Bertagna (ed.), *La ricerca educativa. Indirizzi nazionali e internazionali. Prima Conferenza della ricerca educativa e pedagogica* (Dipartimento di Scienze umane e sociali – Università degli Studi di Bergamo, Bergamo 5 dicembre 2016), «Nuova Secondaria Ricerca», vol. XXXIV, n. 9, 2017, pp. 11-14.

progetti europei ecc.), i quali hanno avuto il solo grande risultato di generare un'irrazionale corsa a chi riusciva ad accaparrarsi – per sé o per i propri allievi – il maggior numero di “bollini” (o di “punti-premio”), non senza la creazione di situazioni del tutto artificiose.

Per altri versi, i nuovi e stringenti criteri introdotti dall'ANVUR in materia di valutazione della ricerca e di selezione e reclutamento dei ricercatori hanno comportato anche la radicale modifica dei modi e delle forme tradizionali di addestramento alla ricerca dei giovani, di individuazione e approfondimento dei temi e filoni di ricerca di maggiore rilevanza e, infine, di divulgazione degli stessi risultati della ricerca.

Con riferimento all'individuazione e all'approfondimento dei temi e filoni di ricerca di maggiore rilevanza, segnalerei come un fatto estremamente preoccupante il forzato abbandono di indagini di ampio respiro e di lunga durata, come anche di ricerche di grande mole condotte non da singoli, ma da équipes di studiosi e ricercatori – come, ad esempio, nel caso del DBE³ – perché non coerenti con i tempi stretti della rendicontazione ministeriale del lavoro di ricerca e con la logica degli «adempimenti» di carattere quantitativo (*tot* articoli su rivista, *tot* capitoli di libro, *tot* monografie da pubblicare ogni anno ecc.) richiesti dalle nuove disposizioni in materia.

Per quel che concerne la divulgazione dei risultati della ricerca, segnalerei rapidamente due aspetti: il rischio della vera e propria perdita di valore di alcune tipologie di prodotti sulla base di «ragioni in larga misura estrinseche» alla ricerca stessa (ad esempio: la forzata e incomprensibile contrapposizione tra monografie e articoli editi su riviste indicizzate in ISI o SCOPUS; quella altrettanto assurda tra articoli pubblicati su riviste e saggi editi in opere miscellanee; la sostanziale emarginazione delle curatele e degli atti di convegni ecc.), o del vero e proprio abbandono, con riferimento soprattutto al nostro settore scientifico-disciplinare M-PED/02, di alcune tipologie di prodotti (ad esempio: le “rassegne di studi”, le “edizioni critiche di carteggi e di testi inediti”, le recensioni ecc.).

Relativamente alla preparazione dei giovani ricercatori e all'addestramento alla ricerca, infine, segnalerei il vero e proprio snaturamento del dottorato di ricerca, la cui ambigua e incerta ridefinizione dal punto di vista dei percorsi formativi e degli obiettivi da conseguire, realizzata per via essenzialmente amministrativa negli ultimi anni, ha finito per renderlo uno strumento sempre meno idoneo alla formazione di base delle nuove leve della ricerca nel settore della storia della pedagogia, dell'educazione, della scuola e della letteratura per l'infanzia.

³ Il riferimento è a G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Bibliografica, 2013, un'opera collettiva cofinanziata dal MIUR, la quale ha richiesto oltre un quinquennio di lavoro e ha coinvolto circa un centinaio di studiosi e ricercatori italiani provenienti da una quindicina di atenei della penisola.

Più in generale, in questi ultimi anni abbiamo assistito al tentativo – in larga misura riuscito, purtroppo! – di delegittimare ed indebolire dal punto di vista politico, oltre che culturale e scientifico, le comunità accademiche e l'istituzione universitaria nel suo complesso: un processo che ha avuto una notevole risonanza mediatica, il cui obiettivo era quello di rimettere in discussione la tradizionale autonomia del settore al fine di sottrarre ai legittimi titolari e di trasferire indebitamente ad organismi di nomina politica (l'ANVUR, il MIUR, lo stesso esecutivo, come nel caso delle cosiddette “cattedre Natta”) funzioni e competenze che da sempre hanno costituito una prerogativa del mondo universitario e delle comunità accademiche:

- È appena il caso di ricordare, ad esempio, che nelle recenti procedure adottate a livello nazionale per valutare la qualità della ricerca universitaria, da parte del MIUR (per il tramite dell'ANVUR) sono state stabilite a priori le tipologie di lavori scientifici da valutare o da non valutare e sono state imposte, anche in questo caso dall'alto, senza un effettivo confronto con le comunità accademiche e scientifiche, una serie di griglie di valutazione basate o su astratti indicatori di tipo bibliometrico o su generici criteri in larga misura estrinseci alla ricerca stessa per verificare le caratteristiche e la rilevanza di ogni singolo «prodotto della ricerca» relativo ai diversi settori scientifico-disciplinari.
- Allo stesso modo, va ricordata la recente introduzione nel nostro paese, sempre ad opera del MIUR (per il tramite dell'ANVUR), di una formale e ufficiale classificazione delle riviste italiane e straniere che, sulla base di una serie di parametri di carattere essenzialmente formale e burocratico, fissati dallo stesso MIUR (sempre per il tramite dell'ANVUR), possono essere definite autenticamente «scientifiche», e di quelle, tra queste ultime, che meritano di essere senz'altro collocate ai vertici della classifica, ovvero inserite in una sorta di «fascia A» dell'eccellenza. Un'operazione di questo tipo, oltre a rappresentare l'imbarazzante tentativo di approdare ad una valutazione più “oggettiva” e “rapida” degli studi condotti nell'ambito delle scienze umane e sociali, attribuendo al singolo contributo (l'articolo scientifico oggetto della valutazione) la presunta qualità del contenitore nel quale è ospitato (la rivista scientifica), testimonia chiaramente il tentativo di aggirare e svuotare indebitamente – in nome di una presunta “direttività” o di un presunto “primato” della politica – il «criterio della competenza scientifica», il quale appartiene necessariamente ai singoli studiosi e alle comunità accademiche.
- infine, è appena il caso di segnalare che le procedure di selezione e reclutamento e quelle per la progressione di carriera dei ricercatori e professori universitari sono state parzialmente sottratte al controllo delle comunità scientifiche (tramite l'introduzione del *sorteggio*) e sottoposte ad una minuziosa quanto astratta ed estrinseca regolamentazione di carattere formale, il cui improbabile obiettivo dovrebbe essere quello di

ridurre il più possibile i rischi della ‘soggettività’ nei giudizi e di consentire l’approdo ad una valutazione realmente ‘oggettiva’. In tal modo, sia pure in forma ambigua e surrettizia, è stato rimesso in discussione – e di fatto fortemente indebolito – il principio della *cooptazione accademica*, in virtù del quale non le ragioni della politica, o dell’economia, o di specifici interessi di vario genere, ma solo quelle della *competenza scientifica* possono legittimare la scelta di coloro che sono chiamati a valutare e a selezionare i futuri ricercatori.

2. Oltre la «logica degli adempimenti»: alcune semplici proposte operative e alcuni possibili ambiti d’impegno

Alla luce delle riflessioni sopra richiamate, e della conseguente necessità di rilanciare a tutti i livelli la ricerca storico-educativa, restituendo autorevolezza e progettualità alla nostra comunità di studiosi e ricercatori di M-PED/02, ci sembra opportuno illustrare, qui di seguito, una serie di ipotesi di lavoro e di proposte operative che, a nostro avviso, possono favorire nuove prospettive di rilancio e di crescita per il settore scientifico-disciplinare M-PED/02 e consentire a tutti noi un vero e proprio salto di qualità.

In via preliminare, è necessario abbandonare la «logica degli adempimenti», nella quale siamo immersi da qualche anno, per recuperare e fare nostra, come comunità di studiosi, un’autentica logica della progettualità culturale e scientifica, in grado di affrontare i principali nodi problematici che caratterizzano l’attività di ricerca nell’ambito di M-PED/02. Tra questi nodi, segnalerei la stringente (e urgente) necessità:

- di ridefinire, come comunità di studiosi di M-PED/02, in un libero e costruttivo confronto che ci veda tutti coinvolti e impegnati, quelle che sono le coordinate fondamentali e le dimensioni caratteristiche della ricerca nel nostro settore;
- di delineare assieme, anche qui in un libero e impegnativo confronto tra studiosi (e non tra giuristi e burocrati ministeriali) quelli che sono i criteri di valutazione della ricerca nel settore della storia della pedagogia, dell’educazione, della scuola e della letteratura per l’infanzia, anche al fine di evitare che tali criteri ci siano imposti dall’esterno (ANVUR, MIUR ecc.) e facciano riferimento ad elementi solo formali o chiaramente estrinseci, quando non addirittura del tutto estranei alla ricerca stessa;
- di ripensare in forme nuove e originali, sempre come comunità di studiosi e ricercatori di M-PED/02, ad una questione solo apparentemente secondaria, qual è quella delle cosiddette infrastrutture e degli strumenti per la divulgazione e valorizzazione dei risultati della ricerca. Su questo

- versante: (a) c'è la necessità di ripensare gli attuali *format* e la stessa funzione delle riviste scientifiche, al di là della fascia A e degli adempimenti formali introdotti dall'ANVUR; (b) si pone altresì l'esigenza di individuare i criteri che debbono caratterizzare le eventuali collane editoriali destinate alla pubblicazione di monografie, miscellanee, atti di convegni ecc.; (c) infine, è opportuno ridefinire assieme le caratteristiche e modalità della *peer review* nel nostro settore scientifico-disciplinare (referaggio di articoli da pubblicare su rivista, valutazione di progetti di ricerca ecc.);
- di avviare un'indispensabile e urgente riflessione comune attorno al concetto di internazionalizzazione della ricerca (e di una formazione dei giovani ricercatori in linea con tale processo), anche al fine di andare oltre le banalizzazioni, i modi un po' provinciali e l'eccessivo formalismo con cui, in questi anni, l'internazionalizzazione è stata in diversi casi concepita e praticata. Il rischio, su questo versante, è quello di rinunciare alle nostre tradizioni storiografiche in nome di un'apertura internazionale vissuta talvolta in forme palesemente subalterne, ovvero come accettazione acritica e passiva di tutto ciò che si fa all'estero; di perdersi (magari procedendo singolarmente e in ordine sparso) appresso a una moltitudine di *call for paper* di mediocre significato e valore per il solo fatto che sono promosse da atenei e gruppi di ricerca stranieri; di disperdere una grande tradizione metodologica e storiografica, la quale, viceversa, dovrebbe costituire il principale punto di riferimento – la nostra vera e propria “stella polare” – nel momento in cui ci si avvia ad un serio e organico confronto con comunità di studiosi di diversi paesi, con storiografie “altre” rispetto alla nostra;
 - infine di ripensare il dottorato di ricerca e, più in generale, la formazione dei giovani ricercatori di M-PED/02, provando ad andare oltre gli adempimenti formali e meramente burocratici stabiliti dal MIUR ed ipotizzando itinerari e programmi di formazione dei giovani condivisi e riconosciuti a livello nazionale (e gradualmente, magari, anche a livello internazionale!) in quanto legittimati non da pronunciamenti dell'ANVUR, ma da una progettualità e da una valutazione di competenza espresse in forma esclusiva dalla stessa comunità di studiosi di M-PED/02.

Conclusioni

Le ipotesi di lavoro sopra prospettate costituiscono, naturalmente, solo degli spunti per la discussione. Le accomuna, tuttavia, un elemento che riteniamo a vario titolo indispensabile: la necessità e l'urgenza, come comunità accademica di M-PED/02, di recuperare l'esercizio di una seria e organica progettualità culturale e scientifica in seno al nostro settore di ricerca.

È chiaro che, per realizzare tale obiettivo, occorrono una grande coesione e una piena condivisione di strategie e di obiettivi tra di noi. Del resto, la *logica punitiva* che ispira i recenti provvedimenti MIUR (dai drastici tagli all'FFO, il *Fondo di Finanziamento Ordinario* degli Atenei, all'istituzione delle cosiddette "cattedre Natta" per professori eccellenti selezionati dal governo, per citare solo i più recenti) fa leva proprio sull'isolamento dei singoli docenti, sulla frammentazione delle comunità accademiche di settore, sulla sostanziale inadeguatezza culturale e scientifica di chi si accontenta e fa propria la «logica degli adempimenti» a cui si è accennato sopra.

Di qui l'invito caloroso a dare vita ad una nuova fase di confronto e di progettualità in seno alla nostra comunità accademica e al nostro settore di ricerca che coinvolga liberamente tutte le sedi e tutti i colleghi "di buona volontà" che si riconoscono, in tutto o in parte, nell'analisi sopra proposta e negli obiettivi che da essa scaturiscono.

Una nuova fase di confronto e di progettualità che abbia nel CIRSE (Centro Italiano per la Ricerca Storico-Educativa), la società scientifica di riferimento del nostro ambito di studi, e – per quel che concerne il più ristretto ambito degli studi sul patrimonio – nella neonata SIPSE (Società Italiana per lo studio del Patrimonio Storico-Educativo) le sue «cabina di regia» e i suoi luoghi di elaborazione e di coordinamento.

L'Éducation en France à la «Belle Époque». La jeunesse française à la veille de la Grande Guerre

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Education in France at the «Belle Époque». French youth on the eve of the Great War

ABSTRACT: The article presents with rich details scholarly and educational events of France between the end of the nineteenth century and the First World War. Depending on a broad and rational bibliography, the author provides a documented framework of school and university French. Particular attention is finally directed at the vibrant intellectual and cultural world in Europe at that time.

EET/TEE KEYWORDS: History of School; History of University; *Belle Époque*; France; XX-XXIth Centuries.

Dans les années 1890, la lutte contre l'analphabétisme portait ses fruits en France. Un enfant seulement sur huit échappait à l'obligation scolaire, ce qui ne dispensait pas nombre de petits ruraux de faire l'école buissonnière et de désertier la classe au moment des gros travaux des champs. Vers 1900, seuls 4% des enfants ne savaient ni lire, ni écrire, ni compter. En 1898, 8% des hommes et 12% des femmes qui se mariaient signaient encore d'une croix le registre de l'Etat civil; mais en 1912, la proportion tombait à 1,3% et 2,9%. L'enseignement primaire reposait sur des programmes encyclopédiques pleins de «savoir pratique», obsédés par «ce qu'il n'était pas permis d'ignorer» si l'on voulait devenir un paysan avisé, un ouvrier habile et un bon citoyen. Une morale civique et sociale conduisait à une juste docilité et la pédagogie ne voyait dans l'enfant qu'un adulte en puissance; mais elle se fiait à des règles répétitives d'une redoutable efficacité.

Certes, les lois sur les congrégations religieuses du début du siècle avaient partiellement désorganisé leurs écoles, la Séparation de l'Eglise et de l'Etat

aggravant les difficultés de leur remplacement par des établissements scolaires libres; mais le catholicisme fit preuve d'une grande vitalité. Les écoles privées tenues par des religieux, mais aussi de plus en plus par des laïques, reprenaient leur souffle et elles accueillait 1.250.000 élèves en 1900, scolarisant près d'un enfant d'âge scolaire sur quatre. Le Vivarais était un bon exemple de ces régions où la «guerre scolaire» continuait à faire rage. Le «Massif central blanc» s'était opposé à la loi de 1905, notamment en Lozère et en Haute-Loire. Dans le nord de l'Ardèche, les passions religieuses restaient vives: on y était «réformé» ou «papiste», «rouge» ou «blanc». L'histoire de France semblait n'y avoir laissé que deux traces de son passage: la Réforme et la Contre-Réforme, la Révolution et la Contre-Révolution. L'Ardèche était peu scolarisée. En 1912-1913, 21% des jeunes mariés et 28% des jeunes femmes restaient illettrés. Les lois du début du siècle avaient durement frappé l'enseignement des congrégations religieuses dans le département: l'expulsion de 600 religieuses concernait 195 communes et près de 6.000 enfants. Pour continuer à enseigner dans les écoles libres, les Sœurs devaient être sécularisées. Elles quittaient l'habit ecclésiastique pour une tenue noire, troquaient le voile pour un chapeau et vivaient séparées de leur communauté afin d'éviter le délit de reconstitution illicite de congrégation. Il est vrai que la sécularisation les contraignit à acquérir le diplôme exigé désormais pour enseigner, les élèves des établissements privés affrontant de plus en plus des jurys d'examen. La bourgeoisie locale tenait à ce que les fils de ses employés fussent instruits à l'école libre et elle refusait d'envoyer ses filles dans une «école sans Dieu». En Bretagne, les passions des curés et des châtelains nourrissaient les ripostes des anticléricaux. Des prêtres privaient de sacrements les enfants scolarisés dans les écoles publiques, des hobereaux introduisaient dans les baux de location l'exigence de la fréquentation de l'école privée par les enfants de leurs fermiers et des commerçants mettaient les institutrices laïques en quarantaine, leur refusant les aliments de première nécessité. En Bretagne, le retard de l'alphabétisation était moins une conséquence du sous-développement économique qu'une manifestation de rejet de la langue nationale. La résistance à la scolarisation n'était pas uniquement liée à un sacrifice jugé inutile par les parents. Elle s'expliquait aussi par l'usage de la langue bretonne dans la catéchisation qui freinait la demande d'instruction et résistait à la francisation. Le département du Morbihan était considéré comme le plus mal scolarisé. Il resta longtemps à la dernière place quant au nombre d'alphabétisés. Son Conseil général qui réunissait les élus des différents cantons s'était longtemps opposé à l'ouverture d'écoles normales primaires et il fut l'un des derniers à en créer en 1884; mais cela ne fit que renforcer le dualisme scolaire de la région. L'enseignement laïque était concurrencé par celui des Congrégations des Frères de Ploërmel et des Sœurs de Bignan, les premiers étant relativement plus diplômés que les autres religieux enseignant dans l'Ouest de la France. Après l'agitation qui accompagna l'application des lois de Séparation de l'Église et de l'État, les écoles publiques du département d'Ille-et-Vilaine perdirent près de

9 000 élèves entre 1907 et 1913, soit 18% de leur effectif. Une lente évolution se dessina pourtant en faveur de l'enseignement d'Etat grâce à la ténacité de l'administration républicaine. Les préfets imposèrent la création d'une école publique à des communes réticentes et les inspecteurs primaires dénoncèrent sans cesse les insuffisances de l'enseignement privé.

Le département du Maine-et-Loire était plongé lui aussi dans la «guerre scolaire». Les instituteurs laïques ne pouvaient s'y imposer qu'en menant un combat militant. Ils jouissaient d'un certain prestige lié non seulement à leur savoir, mais aussi à l'intérêt qu'ils portaient à la formation des agriculteurs du fait de leur recrutement local. L'instruction n'apparaissait pourtant pas comme le but principal de la laïcisation. Il s'agissait davantage d'un moyen destiné à atteindre un idéal civique. Les laïques du Maine-et-Loire étaient très sensibles à l'image morale des maîtres. L'une des attaques cléricales était la mise en cause de leur patriotisme, les catholiques la présentant comme une conséquence logique de leur athéisme. Les comités cantonaux animés par la noblesse locale aidaient les 363 écoles libres de filles et 61 de garçons, et ils surveillaient les manuels scolaires en usage dans les établissements publics. Ils s'en prenaient notamment aux *Eléments d'instruction civique* d'Alphonse Aulard, titulaire de la chaire d'Histoire de la Révolution française à la Sorbonne, et aux *Leçons de morale* de son collègue rationaliste, le sociologue Albert Bayet. Les catholiques angevins condamnaient la mentalité des 1.115 instituteurs laïques qui enseignaient à 37.857 élèves du département. Ils alternaient les protestations outragées et les menaces, l'évêque d'Angers rejetant sur l'«école sans Dieu» la responsabilité de l'exode rural dans son diocèse. Dans le département de l'Orne, la laïcisation des écoles communales avait été lente, ne s'achevant que vers 1900. Cette situation était liée au pragmatisme des responsables locaux, le clergé ne se mobilisant guère contre l'«école sans Dieu». Bien qu'urbanisé, le département de Loire-Inférieure était médiocrement scolarisé. Comme dans beaucoup de départements de l'Ouest, les exploitants agricoles étaient moins alphabétisés que leurs ouvriers. De 1880 à 1910, l'augmentation des effectifs scolaires permit d'atteindre un taux de scolarisation proche de 80%. En 1906, les écoles de Nantes et Saint-Nazaire étaient surchargées d'élèves; mais leur fréquentation restait insuffisante, les enfants n'étant scolarisés qu'entre 8 et 12 ans. La situation ne s'améliora à Nantes qu'avec le livret scolaire obligatoire pour chaque enfant. Les écoles publiques de Loire-Inférieure ne cessèrent de gagner du terrain jusqu'en 1914; mais la réaction de l'enseignement privé lui permit de les dépasser en nombre d'élèves en 1923. Dans le département de la Vendée, les effectifs des établissements libres devinrent majoritaires en 1926. Les écoles publiques de ce département ne bénéficiaient pas du soutien de communes gérées par des catholiques conservateurs et le renforcement de la petite exploitation familiale au détriment du travail salarié provoqua le départ de familles pauvres qui envoyaient leurs enfants à l'école publique; mais 10% des enfants du département continuaient à ne pas fréquenter l'école en 1910.

Le taux de scolarisation du département du Pas-de-Calais atteignit 75% en 1913; mais il était inférieur à celui du Nord (82,6%). Le non-respect des lois scolaires était lié au travail des enfants dans les houillères et dans les filatures. Ces industries avaient besoin de main d'œuvre et elles n'appliquèrent la réglementation que tardivement. Les milieux ouvriers considérèrent longtemps l'instruction comme l'apanage des classes sociales aisées et l'assiduité en classe n'était pas respectée. La laïcisation progressait dans les deux départements. Les écoles congréganistes accueillaient le tiers des enfants scolarisés en 1889 et les établissements privés n'en conservaient que le quart en 1925. Toutefois, les Flandres avaient connu de graves incidents lors de la Séparation de l'Eglise et de l'Etat. La ferveur religieuse augmentait dans la plaine du Lys et dans le Calaisis rural, pendant que l'Artois méridional évoluait en sens inverse. La classe ouvrière s'éloignait de l'Eglise, mais une partie de la classe moyenne et de la bourgeoisie s'en rapprochait. Le dernier tiers du XIX^e siècle et le début du XX^e virent même une certaine reconquête religieuse en France. Les instituteurs de Meurthe-et-Moselle restaient très attachés à leur village et l'Ecole normale de Nancy en avait fait des missionnaires du progrès de l'agriculture. Ils prônaient les engrais chimiques, le remembrement des terres, les nouveaux défrichements, le drainage, l'achat de nouvelles machines agricole, la sélection des semences et des animaux reproducteurs. Les instituteurs dénonçaient les fléaux sociaux de l'usine, la débauche et l'alcoolisme propagés par la ville. En Meurthe-et-Moselle, les enfants étaient plus nombreux dans les foyers ouvriers que dans ceux des paysans; mais ils étaient plus souvent absents à l'école.

La scolarisation dans le département du Doubs, déjà élevée en 1881, progressa jusqu'en 1914. L'assiduité restait pourtant insuffisante, empêchant l'instituteur d'organiser son enseignement. Cette situation était imputable aux travaux des champs; mais l'état sanitaire s'ajoutait aux causes économiques et sociales pour détériorer l'assiduité qui tomba même à 78% en 1910. La laïcisation provoqua une rapide disparition de l'enseignement congréganiste masculin. Beaucoup de religieuses obtinrent par contre le brevet indispensable pour enseigner; mais leurs écoles ne concernaient que 16,4% de la population scolaire du département en 1902. Le Var était un vieux département républicain où l'anticléricisme restait étroitement lié au problème de l'école. La législation laïque permit d'y affaiblir durablement l'enseignement catholique et les Varois acceptèrent volontiers la fermeture des établissements tenus par des congrégations religieuses. La laïcisation des écoles communales fut plus progressive. Le conflit le plus vif concerna l'instruction civique et le manuel en usage de Gabriel Compayré; mais si beaucoup de prêtres varois n'aimaient pas la République, ils ne voulaient pas prendre partie contre elle. Les instituteurs du Var furent parmi les premiers à constituer des associations à forme syndicale adhérant à des Bourses du Travail.

En juin 1908, le ministre de l'Instruction publique Gaston Doumergue déposa des projets de loi protégeant l'école publique. En septembre, l'épiscopat entra en lice avec une déclaration collective qui recommandait aux pères de famille

de faire respecter «une honnête neutralité» dans les écoles publiques et, le cas échéant, d'en interdire l'accès à leurs enfants; mais les associations catholiques étaient divisées. Les plus proches de l'Action libérale catholique ne souhaitaient pas leur donner un caractère confessionnel, les autres le revendiquant au nom de la défense de la morale chrétienne. Sous la pression du Saint Siège, une seconde déclaration des évêques français durcit le ton en septembre 1909, condamnant la neutralité de l'école publique. Les «amicales» d'instituteurs qui comptaient près de 100.000 membres protestèrent énergiquement, et des prêtres qui profitaient de l'enseignement du catéchisme pour donner un enseignement d'histoire furent condamnés. La «guerre des manuels scolaires» revenait au centre de la lutte politique. Les catholiques obtinrent le droit de contester le choix des instituteurs en la matière, mais ces derniers eurent le dernier mot. Le contraste entre les deux déclarations de l'épiscopat français témoignait d'une opposition persistante entre catholiques libéraux et conservateurs. Par contre, si les Républicains se divisaient entre modérés et radicaux à propos du laïcisme, ils se retrouvaient côte à côte pour défendre la laïcité.

Les catholiques redoutaient la disparition du caractère sacramentel des étapes initiatiques de l'enfance et de l'adolescence. Ils s'en prenaient à la morale laïque qu'ils réduisaient volontiers à un catalogue de préceptes dénués d'inspiration spirituelle; mais ils doutaient du patriotisme de l'école publique et faisaient l'éloge de l'unité nationale. Le martyr du héros qui donne sa vie pour la patrie pouvait conduire à la sainteté lorsqu'il était souffert pour Dieu et pour la France. Les catholiques épousaient aussi la cause de l'impérialisme colonial et leur condamnation de l'Islam n'était pas étrangère à l'évangélisation de l'Afrique par des missionnaires français. Ils se défendaient d'attenter aux libertés et prétendaient lutter au contraire pour une liberté authentique, conquise par les communes médiévales sur l'arbitraire seigneurial et menacée par les empiètements du pouvoir républicain. Les polémiques autour de l'école confirmaient la place prépondérante des manuels dans l'éducation. Les illustrations liées au progrès technique les transformaient en album de famille et en agent privilégié d'unification nationale; mais derrière les références idéologiques et les ambitions politiques des pouvoirs civils et religieux se profilait une réalité mieux adaptée aux situations locales. La vie de l'école restait tributaire de la stratégie des familles et la situation générale n'était que le résultat d'une mosaïque de cas particuliers.

La scolarité obligatoire s'achevait par un Certificat d'Études Primaires (C.E.P.) très sélectif, 3 élèves sur 4 quittant l'école sans l'avoir obtenu. Chaque année, les épreuves de l'examen étaient célébrées comme une fête et un couronnement. Les lauréats encadraient leur diplôme pour l'accrocher dans leurs chambre à coucher. Les instituteurs se rendaient indispensables dans la vie villageoise, donnant l'exemple de nouvelles sociabilités fondées sur le progrès; mais, la condition magistrale avait beaucoup évolué depuis la fin du siècle précédent. L'instituteur était le fonctionnaire le plus mal rétribué et l'amélioration de

son niveau culturel fléchissait depuis les années 1910. Les programmes des écoles normales primaires étaient surchargés et la formation pédagogique y était négligée. Les meilleurs élèves démissionnaient pour poursuivre dans l'enseignement secondaire des études qui leur assuraient une promotion sociale. Séduits par un positivisme dont une partie des élites françaises était en train de s'éloigner, les instituteurs ne voyaient dans le catholicisme qu'un instrument aux mains de la conservation sociale, une puissance des ténèbres qu'il fallait combattre activement. Les institutrices étaient moins bien payées et moins bien formées que leurs collègues masculins. Rivaless de la Sœur enseignante, elles étaient généralement plus vulnérables et moins bien défendues qu'elle. Alors que le recrutement des maîtres se faisait plus ouvrier, l'appel du socialisme devenait plus séduisant; mais il n'était entendu que par une minorité plus sensible à l'idée de solidarité avec les pauvres qu'aux doctrines socialistes marxistes. Les «amicales» d'instituteurs, fortes de 85.000 adhérents en 1907, décevaient une clientèle de jeunes maîtres qui avait lancé dès 1903 le mouvement des «émancipations», plus revendicatif sur le plan social. La Fédération des syndicats d'instituteurs constituée dans l'illégalité fut dissoute après son congrès de Chambéry (1912) pour avoir soutenu le «Sou du soldat», une organisation de propagande antimilitariste de la Confédération Générale du Travail (C.G.T.). Les instituteurs, comme tous les fonctionnaires, n'obtiendront le droit de se syndiquer qu'après la Première guerre mondiale.

Au début du XX^e siècle, les médecins vantaient les vertus de l'exercice physique et de l'oxygène absorbée à pleins poumons. L'école poursuivait son combat contre l'alcoolisme qui était considéré comme le signe le plus redouté de la dégénérescence. En 1900, la France comptait en effet un débit de boisson pour 54 adultes. L'alcool était consommé sous toutes ses formes, à table comme au café. On en apprenait l'usage au service militaire et au travail, dans l'intimité familiale comme dans les associations de quartier. L'école laïque restait mobilisée contre ce fléau social, l'Etat se préoccupant de la formation physique et militaire des citoyens. Les enfants en étaient souvent les premières victimes et la loi du 12 avril 1898 avait instauré leur protection pénale pour réprimer les violences, les actes de cruauté et les attentats sur les mineurs. L'enfant avait besoin pour s'épanouir de plus de liberté et d'espace, d'air et de soleil. Ce n'était pas l'objectif des «Bataillons scolaires». Un décret de 1888 les avait organisés sous forme d'une instruction militaire englobant la gymnastique, l'école de compagnie et les exercices de tir. Les «Bataillons scolaires» étaient engagés dans la bataille laïque et 25 départements n'en avaient jamais eu,68 en comptant à peine une vingtaine. Leurs exercices gênaient l'instruction religieuse et contrariaient la célébration des offices, notamment pour les garçons qui s'apprétaient à faire leur première communion. L'obéissance et le respect des chefs qu'on inculquait dans les «Bataillons scolaires» développaient les sentiments civiques et patriotiques des enfants; mais leur déclin s'expliquait par le caractère insupportable d'une

discipline trop rigide et ils disparurent peu à peu. Toutefois, l'enseignement de la gymnastique et les exercices militaires restèrent obligatoires à l'école publique.

Les hommes politiques et les pédagogues considéraient le sport avec suspicion. La gymnastique put s'insérer dans l'école, son enseignement obéissant à une méthode progressive et rationnelle basée sur l'ordre et la discipline, sous l'autorité d'un maître. Le sport au contraire laissait trop de liberté aux élèves et aucune pédagogie ne pouvait le contrôler. On refusa de créer un corps enseignant adapté et le système scolaire resta étranger à cette discipline. Sous l'impulsion de Pierre de Coubertin, le sport se développa hors de l'école. Il contribuait à un épanouissement de la personnalité en agissant sur le caractère; mais ses activités d'aspect ludique répondaient aux aspirations d'une bourgeoisie plus libre de son temps que les masses populaires. Le sport s'implanta en France sur les ailes d'une anglomanie, le football et le cyclisme ne parvenant à conquérir le grand public qu'au niveau de ses aspects spectaculaires. Une lutte s'engagea entre la gymnastique traditionnelle porteuse de symboles pédagogiques où dominaient le patriotisme et les jeux sportifs qui mettront vingt ans pour atteindre les couches populaires. Bien que l'activité sportive fût placée au-dessus des croyances et des partis, elle ne resta pas impartiale. Le sport joua donc un rôle dans les affrontements entre laïques et catholiques du début du siècle.

L'enseignement secondaire restait le privilège d'un petit nombre. La réforme de 1902 l'avait transformé en un ensemble homogène divisé en 2 cycles de 4 et 3 ans, et en 4 «sections» (latin-grec, latin-langues, latin-sciences et sciences-langues); mais cette dernière «section» sans latin, incapable de s'inspirer d'un humanisme moderne, se contenta de recueillir les élèves incapables de suivre l'enseignement classique. Le passage du discours latin à la dissertation française avait été une véritable mutation pédagogique, le plan l'emportant désormais sur le style et la critique sur la rhétorique. La philosophie étudiée en dernière année devait permettre aux élèves de distinguer le vrai du faux et les émanciper par l'exercice de la raison. Les méthodes pédagogiques, fondées sur des exercices de composition à base de dissertations et d'explications de textes, restaient attachées à un système d'émulation. L'enseignement des sciences avait recours à la méthode expérimentale pour assurer à la formation une soumission au réel. Les langues anciennes devaient contribuer à la formation de l'esprit et le grec reculait au profit des langues vivantes; mais les humanités classiques restaient essentielles. La place de l'Antiquité dans les programmes d'histoire était réduite pour permettre l'enseignement de la période contemporaine et de la Révolution française. Le professeur d'histoire devenait un maître d'instruction civique. La spécificité de l'enseignement secondaire venait aussi du recrutement de ses élèves. Les lycées et collèges disposaient en effet de classes primaires propres (le «petit lycée») où enseignaient des maîtres titulaires d'un diplôme d'aptitude au professorat des écoles élémentaires qui appartenaient à un corps distinct de celui des instituteurs.

L'enseignement secondaire public disposait depuis 1880 de lycées et collèges de jeunes filles. Leur spécifié était d'abord pédagogique, ses cours étant dispensés par une seule enseignante en lettres ou en sciences. Les programmes ne s'étendaient que sur 5 années d'études, au lieu de 7 dans les établissements de garçons; ils dispensaient une culture sans latin comportant des enseignements pratiques. En 1913, 100.000 élèves (dont 30.000 dans les classes du «petit lycée») fréquentaient les 343 lycées et collèges. Les 138 établissements publics féminins comptaient 33.000 élèves (dont 13.500 dans leurs classes primaires). Le baccalauréat n'était délivré qu'à 7.582 candidats, dont 4.788 diplômes classiques. Le corps des professeurs avait été profondément remanié entre 1875 et 1895. Les élèves de l'Ecole normale supérieure de la rue d'Ulm à Paris étaient concurrencés dans le concours de recrutement d'agrégation par des étudiants venus de l'université. L'agrégation fournissait chaque année plus de la moitié des 200 professeurs recrutés et les licenciés refluèrent du lycée vers les collèges. Le principe du choix des manuels scolaires par les enseignants avait été étendu aux établissements secondaires. Le catalogue des livres recommandés par le ministère n'était qu'indicatif, les enseignants étant libres de ne pas le respecter. L'année scolaire s'achevait sur la cérémonie solennelle de remise des prix, véritable événement dans la vie de l'établissement et dans celle de la bourgeoisie locale. Les professeurs adhéraient à une Fédération Nationale de l'Enseignement Secondaire qui tenait un discours catégoriel et apolitique

Les lois contre les congrégations avaient désorganisé les institutions religieuses enseignantes qui comptaient 90.000 élèves en 1900 et en avaient perdu plus du quart en 1905; mais elles favorisèrent la création d'un enseignement libre dont les effectifs étaient comparables à ceux des lycées et des collèges en 1914. La loi exigeant le baccalauréat ou la licence pour enseigner dans les établissements libres, des préparations à ces diplômes furent organisées en adoptant des programmes proches de ceux des lycées. A Paris, les jeunes filles qui fréquentaient l'enseignement libre provenaient d'une bourgeoisie financière et industrielle qui acceptait d'envoyer ses fils au lycée. Les ecclésiastiques qui les conseillaient appartenaient à un clergé intellectuel nourrissant peu d'estime pour les religieuses enseignantes. Les nouveaux établissements libres parisiens bénéficiaient du soutien du directeur de l'Institut catholique Alfred Baudrillard et du cardinal Anette, archevêque de la capitale. «Le Collège Stanislas» avait donné l'exemple et le Collège d'Hulst vit le jour grâce au legs d'une riche aristocrate. L'Ecole Fènelon était dirigée par l'abbé Hebert, un proche de monseigneur Duchesne dont l'enseignement ne voyait plus dans les dogmes que des symboles justifiés par leur efficacité pratique. Ces écoles libres, installées dans des locaux inadaptés à l'enseignement, se concentraient dans les quartiers bourgeois de la capitale; mais le clergé n'accepta d'y envoyer ses fidèles qu'à condition de s'en voir confier l'enseignement religieux

La mixité fut tout de suite l'une de ses caractéristiques. L'emploi du temps restait souple et les obligations religieuses moins contraignantes que dans

l'enseignement congréganiste. En 1914, 86 professeurs hommes, provenant d'établissements catholiques mais aussi de lycées parisiens, enseignaient dans ces écoles libres de la capitale. La pédagogie de l'enseignement secondaire public n'était pas du goût des catholiques qui voyaient dans l'esprit critique la finalité suprême des Lumières du XVIII^e siècle. Ils lui reprochaient de s'épanouir dans une pensée libertine incapable d'atteindre les valeurs universelles. Sans doute devait-on respecter la vérité et contribuer à la formation du jugement; mais il ne suffisait pas de solliciter l'intelligence pour y parvenir. Il fallait aussi toucher le cœur et la conscience. En fait, les enseignements publics et privés ne se concurrençaient pas car ils avaient des clientèles différentes; mais les 7 lycées publics féminins de la capitale comptaient plus de 2.000 élèves en 1914, effectif très supérieur à ceux de l'enseignement libre.

L'ambition du pouvoir républicain était de doter la France d'universités capables de rivaliser avec celles de l'Allemagne. Le décret du 8 juillet 1907 transformait la licence en examen spécialisé, la seule survivance du passé étant une version latine. Les licences es-lettres, philosophie et histoire ne seront organisées en 4 certificats qu'en 1920. Le but poursuivi était la formation de véritables universités disposant de 4 Facultés; mais la spécialisation des études supposait la présence de beaucoup d'étudiants et il ne put exister d'universités qu'à Paris, Lyon, Bordeaux, Lille, Montpellier et Nancy. Quelques unes seulement possédaient les 4 Facultés, la plupart n'en avaient que 3. La Faculté devint ainsi la structure essentielle du système universitaire avec un conseil et une assemblée académique. Le nombre d'étudiants doubla entre 1891 et 1908, passant de 19.821 à 39.890. Le Droit avait les plus gros effectifs avec 16 800 inscrits, devant la Médecine 11 500. Paris se taillait la part du lion; en 1898, on dénombrait 12 047 étudiants dans la capitale, soit 42% du total, contre 2.335 à Lyon. A la veille de la Grande guerre, les effectifs d'étudiants parisiens atteignaient 6.000 à 7.000 inscrits en Lettres et Sciences. Le nombre de professeurs d'université doublait, passant de 503 en 1880 à 1048 en 1909. L'enseignement supérieur catholique avait perdu sa qualification universitaire. Cette déclassification n'empêcha pas l'Institut catholique de Paris d'attirer des enseignants prestigieux comme le géologue Albert de Lapparent ou le physicien Edouard Branly. L'enseignement dispensé dans cet établissement s'affranchissait des rigueurs dogmatiques. Louis Duchesne y exposait les faits historiques, même lorsqu'ils favorisaient la critique rationaliste des dogmes. Ses enseignements sur les premiers temps de l'Eglise reposaient sur des bases épigraphiques; ils se situaient dans un mouvement scientifique fondé sur l'exégèse des textes et leur critique historique. Alfred Loisy soumettait les saintes Ecritures aux méthodes de la philosophie moderne: «La science catholique a fait ses preuves, reconnaissait Georges Sorel en 1901, et il faut prendre garde de ne pas l'attaquer sans être parfaitement certain d'apporter des démonstrations concluantes».

Les gouvernements radicaux du début du siècle accordaient des subventions publiques aux associations d'étudiants afin de maintenir sur elles une tutelle de

l'Etat. L'Association Générale des Etudiants de Paris s'était constituée dans un climat patriotique. Elle comptait 400 adhérents et consacrait toute son énergie à collecter des fonds pour la construction d'une Maison des Etudiants; mais elle n'avait que 2.200 membres en 1914, soit moins de 12% des étudiants de la capitale. Des groupes spécialisés regroupaient ceux de Médecine et de Pharmacie. La création de l'Union Nationale des Etudiants de France (U.N.E.F.) en 1907 permit au gouvernement de canaliser les troubles liés à l'augmentation des effectifs. Le nombre d'étudiants était passé de 11.200 en 1876 à 4.200 en 1914, sans compter un peu plus de 6.000 étrangers. Il traduisait l'attrait exercé par l'enseignement supérieur sur les nouvelles catégories bourgeoises. L'intérêt des autorités pour les étudiants venait de leurs craintes devant les ravages de la tuberculose et de la syphilis dans une population concernée par la mobilisation en temps de guerre. Elles rejoignaient celles d'une bourgeoisie qui rejetait la vie de bohème estudiantine. Le socialisme ne mobilisait qu'une infime minorité d'étudiants que l'affaire Dreyfus avait orientée vers une conception humaniste. A l'Ecole normale supérieure, Charles Péguy fondait les «Cahiers de la Quinzaine» pour réfuter les théories du matérialisme historique, notamment celles qui faisaient de la lutte des classes le moteur du processus historique. Il fit de sa revue un foyer de résistance au socialisme scientifique, avant de s'opposer à l'esprit positiviste et laïque du «parti intellectuel» de la Sorbonne. Péguy pressentait le délitement des valeurs traditionnelles dans l'éducation. La vraie laïcité reposait sans doute sur l'entente des hommes dans l'exercice de leur raison naturelle; mais cet humanisme n'empêchait pas l'individu de trouver ses motivations dans ses croyances religieuses.

Les multiples attaques contre la réforme du baccalauréat de 1902 traduisaient l'hostilité croissante de quelques fractions de la classe moyenne et les étudiants en Médecine parisiens étaient les plus perméables à cette opposition. Les effectifs de la Faculté de Médecine de la capitale avaient augmenté de 400% entre 1865 et 1914, pendant que les études médicales devenaient de plus en plus longues et difficiles. Les travaux pratiques se déroulaient dans des laboratoires surpeuplés. Les milieux du Droit se plaignaient des procédures de sélection, mais la contestation étudiante mêlait les revendications les plus diverses aux protestations habituelles contre une discipline trop sévère. La situation se tendit avec la montée en puissance du nationalisme; mais les étudiants étaient minoritaires parmi les Camelots du Roi de Charles Maurras. Les troubles provoqués par les associations étudiantes révélaient l'existence de réels problèmes dans l'université, sans en menacer le fonctionnement. Nombre d'étudiants prêtaient désormais une grande attention aux activités sportives. Ils se passionnaient pour l'automobile et pratiquaient la course à pied, la natation, le football et le tennis; mais les jeunes filles ne suivaient que très lentement le mouvement. Celles qui appartenaient à l'élite intellectuelle n'avaient rien de féministes ou de suffragettes. Pourtant, l'ancien préjugé assimilant le travail féminin à une déchéance était en passe de disparaître.

Les chrétiens ombrageux, républicains de raison, aspiraient à une politique de défense religieuse. Leur engagement guidé par les attaques de la République radicale contre l'Église en faisait des militants; mais les signes d'une renaissance religieuse étaient perceptibles dans la jeunesse intellectuelle. Un groupe catholique s'était constitué en 1908 à la Faculté des Lettres de Paris et l'enseignement de Brunetière à l'École Normale Supérieure contribuait à dissiper le préjugé qui interdisait aux hommes de sciences, comme une faute de goût, de témoigner de leur foi dans leurs écrits. Les normaliens séduits par l'appel de la religion étaient presque tous acquis au catholicisme social de Marc Sangnier et affiliés au mouvement du «Sillon». En 1912, l'École Normale Supérieure comptait une quarantaine d'élèves catholiques, alors qu'il n'y en avait que quatre ou cinq dix ans plus tôt. À l'École polytechnique, le mouvement des «messes pascales» rassemblait 127 communiantes en 1913 et 217 en 1914. Le «Sillon», fondé en 1898, se présentait comme une sorte de mouvement piétiste et social, ses thèmes d'éducation populaire étant propagés dans «L'Éveil». En 1910, Joseph Lotte fondait avec la collaboration du philosophe Jacques Chevalier le «Bulletin des professeurs catholiques d'université» qui entendait étendre le rayonnement de la foi catholique. On trouvait au cœur de l'impulsion philosophique comme dans l'élan religieux une quête de vérité indissociable d'un bouleversement existentiel et Bergson pouvait constater à quel point le mysticisme catholique tourné vers l'action pouvait porter l'évolution créatrice à l'incandescence.

La figure de l'intellectuel fut imposée par les radicaux et les kantieniens lors de l'affaire Dreyfus. Le modernisme hantait l'œuvre d'Henri Bremond qui cherchait une réponse catholique aux critiques scientifiques des Écritures. Il dut quitter la Compagnie de Jésus en 1904 tout en conservant une vision du religieux qui laissait toute sa place à la foi. Suspendu «*a divinis*» pour avoir assisté en 1909 son ami George Tyrrel agonisant, Bremond puisait dans Fénelon l'exemple d'une soumission qui maintenait intacte la protestation d'une conscience convaincue de son bon droit. Son œuvre sur *Sainte Chantal* fut mise à l'Index (1913), au même titre que *Le Saint* de Fogazzaro condamné en 1906 comme l'expression romanesque du modernisme littéraire. *L'Histoire littéraire du sentiment religieux en France depuis la fin des guerres de religion jusqu'à nos jours* de Bremond s'inscrira après la guerre dans une vague mystique significative d'un transfert de l'intellectuel au spirituel. Le «mouvement des conversions», commencé avec celle de Huysmans tombé sous l'influence de l'abbé Mugnier, se poursuivait avec celle du petit-fils de Renan Ernest Psichari. Claudel répondait à Nietzsche. «Oui, Dieu est mort; mais il a la fâcheuse habitude de ressusciter le troisième jour». Bernanos faisait ses premiers pas dans la presse sous le patronage de Léon Bloy et de Charles Péguy. Issu d'une famille protestante et anticléricale, Jacques Maritain militait dans les rangs dreyfusards avant de se convertir au catholicisme (1906) et de s'initier au thomisme sous la direction du père dominicain Humbert Clerissac. L'abbé Mugnier parlait déjà en 1910 de Charles Du Bos dont l'évolution vers le catholicisme se précisera dans les années

de l'après-guerre. Très marqué par l'influence de Bergson, Du Bos cherchera le contact intime et la communication des âmes. Claudel convertissait enfin Jacques Rivière et le retour de Péguy au catholicisme illustre la nouvelle audience de la religion. La thèse de Blondel (1893) avait fait de l'action le fondement de la connaissance, dépassant l'écart entre immanence et transcendance, nature et surnaturel. Elle imposait une discipline purement spéculative proche d'une conception profane de l'ordre du monde et faisait passer le désir naturel de Dieu avant sa fin surnaturelle; mais la renaissance intellectuelle et littéraire chrétienne qui se faisait autour de la théologie mystique de saint Thomas restait circonscrite à une élite.

Certes, l'Association Catholique de la Jeunesse de France (A.C.J.F.) se proposait le perfectionnement individuel de ses membres et la rechristianisation des élites sociales. Elle ne contestait pas la souveraineté populaire qu'elle acceptait sur le terrain des institutions démocratiques et elle donnait au fait républicain l'adhésion intime d'une préférence raisonnée. Sous l'impulsion de *Rerum Novarum*, elle cherchait à s'étendre aux milieux populaires, mais n'y parvenait guère que dans quelques zones rurales. A partir de 1902, elle tint des congrès annuels consacrés à la question syndicale, à la Mutualité, aux conditions de travail de la jeunesse ouvrière, à la question agraire et aux problèmes sociaux; mais les jeunes catholiques devaient se soumettre à la direction souveraine de leurs aumôniers et tenir compte des réticences de l'Eglise. L'association perdait de son autonomie à l'égard de l'épiscopat et d'une bureaucratie cléricale pour qui la renaissance catholique passait par le renouveau des valeurs traditionnelles. Les jeunes catholiques prenaient pourtant conscience de leurs responsabilités et se préparaient à une action religieuse et sociale. Le «Sillon» de Marc Sangnier s'opposait au conservatisme social, mais se distinguait de l'aspect sociétair de l'A.C.J.F. par son caractère communautaire. Leurs dirigeants venaient des mêmes milieux bourgeois, mais avec des mentalités différentes. Les traditionalistes dénoncèrent le «modernisme» du «Sillon» au Saint Siège et le mouvement de Sangnier fut condamné en 1910.

Dans le milieu chrétien, le sport était considéré comme une symbiose entre le corps et l'âme. La pratique sportive pouvait alors prendre un sens religieux; mais les réticences du monde catholique subsistaient autour de la distinction entre la pureté du sport amateur et la corruption mercantile du sport professionnel. Pour les fondateurs de l'Union Générale et Sportive de l'Enseignement Libre (U.G.S.E.L.) en 1911, l'être était plus important que l'action; mais ce primat de l'esprit ne pouvait se concevoir sans une ascèse corporelle. Le sport permettait de rejoindre l'expérience religieuse traditionnelle de la souffrance et l'oubli de soi dans l'épreuve corporelle. Le sport chrétien illustre la santé du corps et de l'âme. C'était une pratique hygiéniste à valeur morale.

Conclusion

Une jeunesse française scolarisée et presque totalement alphabétisée abordait le drame auquel elle allait être confrontée avec le sens des devoirs du citoyen et des sacrifices qu'il implique. Le souci d'un plein épanouissement de l'enfant avait donné une dimension nouvelle à des activités scolaires livresques et poussiéreuses. La gymnastique traditionnelle s'imposait pour des raisons patriotiques et l'école publique se mobilisait au service de la préparation militaire. Les fêtes gymniques renforçaient le sentiment d'appartenance à une communauté et servaient de démonstration de puissance; mais cette ouverture sur la vie ne s'expliquait pas uniquement par la découverte des vertus de l'hygiène. L'époque réagissait contre un excès d'intellectualisme. Certes, le courant laïque revendiquait la formation des consciences en s'appuyant sur les positions éthiques et culturelles de la pensée rationaliste dans l'enseignement; mais il n'excluait plus la possibilité pour l'homme d'atteindre de hautes destinées métaphysiques, pourvu qu'elles s'harmonisent avec les idées de fraternité et de raison. Une nouvelle catégorie bourgeoise, née de l'ascension sociale, revendiquait un accès à la culture. Le spiritualisme séduisait une partie de la jeunesse intellectuelle et la religion n'était plus jugée incompatible avec une attitude scientifique. Avides de succès, les étudiants de 1912 délaissaient les discours et l'idéologie pour l'ivresse de l'action immédiate. Le scientisme était contesté, remplacé par l'intuition, et les sciences sociales ne jouissaient plus de l'engouement du début du siècle. La jeunesse souhaitait se libérer et les engagements volontaires de 1914 vont traduire une volonté d'émancipation. L'élan vital passait pour engendrer une impulsion créatrice et un courant analogue à l'effort conscient; mais sa radicalisation au nom du culte de la cohésion sociale et de la puissance nationale ne concernait qu'une faible partie de la petite bourgeoisie, hostile au machinisme de la société industrielle. La jeunesse répugnait à s'investir dans le matérialisme du socialisme marxiste, tout en restant très attachée à une solidarité envers les masses. L'image qui la montre prête à abandonner ses idéaux humanistes par goût de l'action et de la justice est singulièrement réductrice. Il est certain qu'un courant vitaliste et une volonté d'agir entraînaient un mouvement nationaliste qui prenait le dessus sur l'antimilitarisme; mais les deux tendances n'en subsistaient pas moins à la veille de la Grande guerre. Le goût de l'action de préférence à la spéculation était une preuve du dynamisme de cette génération que la guerre va faucher dans les tranchées ou figer dans le retour à l'ordre du retour à la paix.

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Love, peace, nature. Rural schools of Montesca and Rovigliano

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ABSTRACT: Alice Hallgarten Franchetti (New York, 1874 – Leysin, 1911) played a leading role in the education of the early twentieth Italian century. At the beginning of the century, supported by her husband, Leopoldo Franchetti (Livorno, 1847 – Roma, 1917), Baron and Senator of the Kingdom, she wanted to upset the reality of cultural exclusion of the poorest class, instituting the two rural schools of Montesca and Rovigliano, dedicated at free education for farmers's children in Umbria.

EET/TEE KEYWORDS: History of Education; Rural schools; Farmer's children; Italy; XIX-XXth Centuries.

The Unique Archive of Umbria Region in Solomeo of Corciano, while waiting for a possible shift in Villa Montesca, guards sixty boxes of the complex and multi-faceted educational and social activities of the Barons Alice Hallgarten (1874-1911) and Leopold Franchetti (1847-1917). The first important work documenting the reorganization of such large archival heritage was made by Victor Hugo Bistoni who on 18 February 1987 was commissioned by the Regional Council to inventory «a few tons of documents piled in a warehouse's compartment of the Region situated in the hamlet Solomeo Corciano»¹. The Franchetti papers

¹ V.U. Bistoni, *Grandezza e decadenza delle Istituzioni Franchetti*, Città di Castello (Pg), Edimond, 1997, p. VIII.

had been lying in that place for some years, ever since they had been taken away from the Opera Pia Regina Margherita in Rome due to its suppression and its assets, including the archive owned by Baron Franchetti, had been confiscated by Region Umbria. The archive material [continues Bistoni] I had to re-order and catalog, appeared amassed in a total muddle. Part was contained in worn cartons, part wrapped in big boxes without any indication, part placed in large trunks and, finally, most of it was piled up randomly².

This first classification³ is followed by the re-inventory and reordering operated as part of a general plan drawn up in consultation between Archival Superintendency for Umbria of Perugia and the Region⁴. The product of this collaboration is the current cataloging of archive papers and the library Opera Pia Regina Margherita in Rome – Foundation Franchetti in Città di Castello, which allows scholars to know the major role that the Barons of Noble House Franchetti had in the educational, historical, social and economic events in the Upper Tiber Valley for most of the twentieth century.

Therefore, the mostly unpublished documents we are referring to are from the mentioned archive (in the notes abbreviated as AOPRMFF) and are conserved in the Unique Archives of Umbria Region in Solomeo of Corciano (AURU).

1. *For a peaceful school*

In Italy the first years of the twentieth century witnessed the birth of a transformation process that involved the school system. It finally opened to the popular masses and began to play a central role in society. The main impulse to this renewal was certainly given by the pedagogical theories of activism that, especially in Western Europe and the United States, gave birth to the amazing phenomenon of the new schools⁵.

² *Ibid.*

³ The *Catalogo generale del Fondo Franchetti*, edited by V.U. Bistoni e P. Ceci, is a manuscript dated November 15 1991. Here it is appropriate to clarify that Bistoni, in its «Catalog», used the term «box» to indicate container that normally in archival doctrine is called «file».

⁴ D. Silvi Antonini, *L'archivio e la biblioteca dell'Opera pia regina Margherita di Roma – Fondazione Franchetti di Città di Castello (1866-1982)*, Città di Castello (Pg), Alfagrafica, 2005, pp. 7-8.

⁵ About new schools, among the vast literature on the subject, see the volumes, become «true classics» in the field., of A. Agazzi, *Oltre la scuola attiva*, Brescia, La Scuola, 1955; A. Attisani, *Problemi e prospettive di scuola attiva*, Armando, Roma, 1968; M.A. Bloch, *Philosophie de l'éducation nouvelle*, Paris, PUF, 1948; L. Borghi, *Il fondamento dell'educazione attiva*, Firenze, La Nuova Italia, 1952; E. Codignola, *Le «Scuole nuove» e i loro problemi*, Firenze, La Nuova Italia, 1946; R. Cousinet, *L'educazione nuova*, Firenze, La Nuova Italia, 1953; F. De Bartolomeis, *Cos'è la scuola attiva*, Torino, Loescher, 1962; R. Laporta, *La comunità scolastica*, Firenze, La Nuova Italia 1963; L. Romanini, *Il movimento pedagogico all'estero*, Brescia, La Scuola, 1961.

Demand for new education was, therefore, throughout the twentieth century «a phenomenon not only National but International. In almost all industrialized and developed countries of the western world, it had come, at the turn of this century, to a violent criticism about education in general and school in particular. It is even more surprising that an apparently identical phenomenon is known by different names in different countries. And that is why we talk about «education nouvelle» in France, in Latin America about «*escuelas nuevas*», in North America of «progressive education», in England of «child-centred-education», in Italy about «attivismo [...]»⁶.

In Italy, especially, the new schools were developed in the context of what Lombardo Radice had theorized as a «peaceful school». A school where the teacher meets souls, where he interprets the lives of children who attend it, rather than oppressing them with a lesson prepared at home⁷.

In this framework of school renewal, we can certainly affirm that the rural schools of Montesca and Rovigliano, established by the American Alice Hallgarten Franchetti, can be considered, for the particular attention given to horticulture, nature's issues and outdoor education, a rare model of renewed school.

Both free and providing school meals, they were meant for the Barons Franchetti's settlers and in 1907 recognized by the city of Città di Castello as «schools in relief»⁸, in other words legally accredited and at tutor's own charge.

Breaking schools, at least until the years of Fascist dictatorship, when compared to the «daily routine of normal schools where teachers worked according to the suggested educational rules wanting each class, at the same time, to be taught the same thing»⁹.

Rural schools¹⁰, therefore focused, following the Baron's¹¹ will, on the objective teaching aimed to the farmer's sons, that were anyway bounded to remain farmers. Not ignorant farmers, but equipped with the necessary tools to «improve, on one side, their efforts in fields for a pioneering agriculture and, on the other, to take part in the administration of the farm's management, involving civil and social life»¹².

⁶ W. Böhm, M. Soëtard, *Editorial*, «Rassegna di Pedagogia», vol. LXXIII, nn. 3-4, 2015, p. 245.

⁷ G. Giraldi, *Giuseppe Lombardo Radice tra poesia e pedagogia*, Roma, Armando, 1965.

⁸ AOPRMFF, *Scuole di Montesca e Rovigliano – Carteggio*, b. 1, file 1.

⁹ Bistoni, *Grandezza e decadenza delle Istituzioni Franchetti*, cit., p. 94.

¹⁰ In the context of Italian studies about pedagogical activism, the rural school theme has always been subject of attention. Proof of this is the extensive bibliography (which we refer) of the volume of L. Montecchi, *I contadini a scuola. La scuola rurale in Italia dall'Unità alla caduta del fascismo*, Macerata, eum, 2015 as well as countless articles appeared in the journal «History of Education & Children's Literature».

¹¹ In his latest will the Baron Leopoldo Franchetti forced the unique heir Opera Pia Regina Margherita in Rome to «keep in operation [...], the elementary schools and kindergartens of Montesca and Rovigliano maintaining and, if necessary, doing the work of objective teaching» (AOPRMFF, *Carteggio Amministrativo – Gestione esecutori testamentari*, b. 8, file 23).

¹² Bistoni, *Grandezza e decadenza delle Istituzioni Franchetti*, p. 94.

But above all, pioneering schools whereas the privileged relationship with nature, which was the experimental field of these schools, represented a source of joy and serenity for the children. This thing is evident also by what was written in the school year 1935-1936 by students of Montesca, in the *Presentation of School Newspaper «Love and Peace»*: «We are all sons of the camps and our life flows simple and serene. We want those who love us to participate in our school life and for that, we have noted here the main facts. We don't offer a masterpiece, but the sincere simple expression of our grateful hearts»¹³.

An accurate description of the educational relevance of Montesca can be deduced from the report sent in 1949, by Dina Rinaldi to the Opera Pia commissioner. In this we read:

The school of Montesca was founded by the departed Franchetti Barons with the intention of giving their settlers' children practical knowledge useful to their lives and get them used to the direct observation of things because nothing remains obscure in the minds of children [...]. Not like any other school, that teaches parroting that 2 plus 2 is 4. No, in Montesca you see and experience everything. We, teachers, have a very hard job to do, and the art of knowing how to turn down up to childhood is not easy. According to the principles of the founder of the school, as teachers we must always remember that we have in front of us little souls and minds to educate, worthy of all respect and then all the intellectual and moral forces must aim for their good. When children first arrive at school they are hesitant, someone cries, most of them see in the teacher a person who inspires fear. This preconception must be immediately removed from the child's head. The teacher must be a friend, the spiritual mother of her students, present themselves always smiling, forgetting her worries to give themselves entirely. And if you think that these creatures before coming to school must sometimes walk on a stretch of muddy road, under the rain and snow, arriving with wet feet, we should feel a much inferior than these little heroes who defy the wind and the storm, and it would be a crime not to take care of these dear children with maternal love. [...] According to the intention of the founder of the school all teaching must be made alive to attract the attention of children, who thus would come to school more gladly and get more profit. [...] Here, at the Montesca school for each subject the government program is followed, adding all which was wished by the Baroness, who besides taking care with great interest of the mind, also took care of the body¹⁴.

Since the fifties of the last century, inevitably, started the downward spiral of the two schools. At first, the resignation of the director Maria Pasqui, then, the economic difficulties, which affected the salaries of teachers and also the school management problems combined with the lack of subscribers caused by countryside depopulation, as well as a bad management of the immense Franchetti heritage conducted by the Opera Pia, led to the closure of Montesca (24 June 1980)¹⁵.

¹³ AOPRMFF, *Scuole di Montesca e Rovigliano – Materiale didattico, Corrispondenza interscolastica, lettere augurali, giornalini scolastici*, b. 1, file 4.

¹⁴ The report, not found in AOPRMFF, it is mentioned in Bistoni, *Grandezza e decadenza delle Istituzioni Franchetti*, cit., pp. 139-140.

¹⁵ AOPRMFF, *Amministrazione generale della Fondazione Franchetti – Carteggio*

The closing of Rovigliano, finally, was determined according to Bistoni «by Presidential Decree of May 22, 1981 [...] declaring extinguished the Opera Pia Regina Margherita. Consequently, longer Authority no longer exists, the figure of the manager was missing and then the existing agreement with the Department of Education came to an end»¹⁶.

2. *Pertransiit benefaciendo*

From enrollment registers, from class newspapers and biographical papers of the students, despite some losses, the educational activities of the two rural schools can be clearly reconstructed.

In 1902, following foundation year, the Montesca school counted 40 students (22 males and 18 females) divided from first to fourth grade¹⁷. «The school for farmers' children, wrote Francesco Bettini, was opened October 15, 1901 in the manor house of Montesca. From thence was transferred in 1919 to the farm director house, waiting for its own more suitable building. [...] It had at first forty students -the average number of unique mixed rural schools, entrusted to one teacher – increased over time to a hundred divided into six classes held by three teachers, alternating with shifts of three hours each»¹⁸.

The school of Rovigliano was instituted after the request of semi-illiterate settlers, because their children could not attend with profit the existing public schools due to distance»¹⁹.

The first teacher of Rovigliano was Assunta Paverini²⁰. In a letter dated July 26, 1902, Alice Hallgarten, regarding the employment of the new teacher, specified to Maria Pasqui, teacher at Montesca and woman of confidence for the Baroness, «for her salary, my husband (more for form, you know, than anything else) wants it to be a little less than yours.

In addition, he makes two conditions: 1) that engagement is on a temporary basis, for trial and 2) that her mother should come to live with her.

I am really happy with the idea that thus some good will be done to those poor souls of Rovigliano, without gleam. Talk to her about this, to the new teacher, because she may understand that it isn't a job like any other, to which she is called, but a mission»²¹.

amministrativo, b. 6, file 20.

¹⁶ Bistoni, *Grandezza e decadenza delle Istituzioni Franchetti*, cit., p. 180.

¹⁷ AOPRMFF, *Scuole di Montesca e Rovigliano – Amministrazione scolastica*, register 1.

¹⁸ F. Bettini, *La scuola della Montesca*, Brescia, La Scuola, 1953, p. 7.

¹⁹ *Ibid.*

²⁰ AOPRMFF, *Scuole di Montesca e Rovigliano – Amministrazione scolastica*, *Giornali di classe*, *Scuola di Rovigliano*, register 1.

²¹ M.L. Buseghin, *Cara Marietta... Lettere di Alice Hallgarten Franchetti (1901-1911)*, Città

So, the teachers were required a fervent vocation for their profession. They had to be present and available at the Montesca for the whole day. In this regard, teachers with few family concerns were preferred, to which the baron Franchetti gave food and accommodation at the Villa.

Among the archival documents special mention must go to those drawn up by the teacher Dina Rinaldi. On October 7, 1908 in *Remarks to the class diary*, the Rinaldi teacher described the first school day of Montesca's students: «These children came today for the first time at school making it a great effort to speak. It takes much to have them say their name! Some don't know it, there is little miss Capaccioni Ida that doesn't want to be Capaccioni, but insists that her last name is Sofaravizzi. Miss Ciabatti, then, doesn't open her mouth. Let us hope she wakes up a bit»²². Later, on October 24, she notes: «Miss Concetta Ciabatti who a few days ago was so shy and didn't even say her name now discreetly speaks and shows extreme interest in writing. Miss Ida Capaccioni that hardly fixed attention even for a few minutes, is the only one who mistakes in reading the vowels that the others already know. There is still much to study about these children»²³.

At the Montesca and Rovigliano all students were registered in the *Biographical Cards* reporting the data relating to housing, distance from school, parent information, physical and moral characteristics (hair, sight, hearing, memory, intelligence, attention, language, and talkativeness sensitivity) and any diseases or special requirements. This is the case, for example, of Luigi Tavernelli, born at the Montesca 19 August 1902 and came to school in 1908-1909 and in 1909-1910, for which, following a medical examination in November 1909, was «ordained cod liver oil»²⁴.

Following the periodical checks, then, the *Personal specifications of student* were processed, through a judgment (commendable, good, mediocre, sufficient, insufficient) indicating the level achieved in each subject. The subjects object of judgment, divided into written tests and oral tests, varied depending on the classes and in conformity with ministerial programs²⁵.

As noted above, the hallmark of the two schools is the objective teaching, which, more than to transmission of knowledge, aimed to the acquisition by the students of a know-how, which would coincide for males with country life and farm management, for women with the management of the home and children.

di Castello (Pg), Petrucci, 2002, p. 111.

²² AOPRMFF, *Scuole di Montesca e Rovigliano – Amministrazione scolastica, Giornali di classe, Scuola di Rovigliano*, register 2 (the cover of the register is numbered n. 6).

²³ *Ibid.*

²⁴ AOPRMFF, *Scuole di Montesca e Rovigliano – Amministrazione scolastica, Carte biografiche degli alunni*, b. 1, file 3.

²⁵ Cf. AOPRMFF, *Scuole di Montesca e Rovigliano – Registri unici e generali (1901-1924)*, registers 1-40.

All teaching and, therefore, each school occupation is considered with the same seriousness with which in the social coexistence honest men consider work; and in this way the school is able to be preparation for life and life itself; peaceful, active, productive of good. The education thus implemented makes children able to perform with no effort, but rather with commitment and intelligence beyond school work, also the work of the house and fields; to think with their brain; to start a conduct profoundly honest and conscious; to develop and strengthen in their soul the sense of responsibility and duty; love for the native country and homeland, respect for their fellow, and then, the sense of the Christian universal brotherhood, and the religious need that shuns words and, without forgetting the outward forms and rituals, it is satisfied in full only in the performance of good works²⁶.

This plurality of intent forms the basis of detailed programs. «In compiling these programs, each teacher has followed the government program, adapting it to the rural school in which it is carried out, bearing in mind framework of guidance for the available time and giving more development to those notions which are considered most necessary for small farmers. [...] The duration of each lesson is 20 to 40 minutes from the first class to sixth. [...] It is due to give, for the character of the school, remarkable development to the design. [...] women's work and gymnastics are performed out of schedule»²⁷.

All subjects were taught through practical exercises and with particular reference to farm life or the daily life of children. Thus, the arithmetic problems revolved around buying and selling of livestock or agricultural products, the poems had as their object the countryside, the contents of history, geography and science were clarified with interesting excursions. In a 1909 essay entitled *The house I would like*, for example, the student Antonio Tanzi writes: «The home is the dear place where we live. We all love it, even the beasts are proud to own it and defend it with all their courage. I also feel I love it so much because I was born here and people dearest to me live therein»²⁸.

A large production of teaching materials produced by students is kept in the archive of Solomeo of Corciano. It is mostly notebooks, posters, letters of correspondence, class newspapers and albums, clear sign of the intent of teachers to witness their activities. The teachers in fact, used to apply to all compositions, the indication about the authors and content.

So, the notebooks of the subject of the month²⁹, are made by assembling drawings and texts dedicated to a specific naturalistic topic: in January the snow, in November the fruits, in May the flower buds. Even the exam notebooks preserved, only if error-free, had to be selected by the teachers of the two schools³⁰.

²⁶ Bettini, *La scuola della Montesca*, cit., p. 39.

²⁷ Opera Pia Regina Margherita, *Programmi particolareggiati delle scuole a sgravio della Montesca e di Rovigliano*, Città di Castello, Società tipografica Leonardo Da Vinci, 1925.

²⁸ AOPRMFF, *Scuole di Montesca e Rovigliano – Elaborati degli alunni, Quaderni, album ed esercitazioni*, b. 1, file 3.

²⁹ *Ibid.*, b. 1, file 4.

³⁰ *Ibid.*, b. 2, files 3-4.

The Notebooks of meteorological observations testify, again, the habit of a daily report about the weather conditions of the day³¹. In a separate notebook (semen story Notebook) were also reported agricultural news related to each period of the year and the activities to be carried out in the fields according to the seasons³².

In the notebooks of free compositions we find the discussion of issues concerning family, work in the fields or current events. Finally, the archive contains the calligraphy notebooks, arithmetic, geometry, history and geography³³.

One last thought, and perhaps most important, regards the teaching of the Catholic religion in the two schools. If in government schools the teaching of religion had its entrance the day after the Church-State Concordat the 11 February 1929, at Montesca and Rovigliano this teaching is necessary and obligatory since their founding by the will of Alice Hallgarten that, although of Jewish origin, was teaching love for Christ and respect for the Catholic religion. Because this issue would deserve a separate discussion itself, just think here, that it was Alice who asked Don Casciola, pastor of her confidence, to compose especially for her children a prayer to be recited every day, while a candle was lit in front of the icon of the Virgin Mary³⁴.

Respect for the solemnity of religious festivals, then, is witnessed by some letters of March 1902 in which Alice, from Rome, asks the teacher Maria Pasqui to organize a party for Easter. In one of these she writes: «I just want you to organize, even without me, a little Easter party with the children. I was told that to dye eggs you just cook them in water in which beets have been boiled (for red) and spinach (for green). Adding the white eggs you would have the Italian colors»³⁵.

Furthermore, in anticipation of almost a century of the controversy and disputes concerning the presence of the crucifix in school, every classroom in

³¹ *Ibid.*, b. 3, file 2.

³² *Ibid.*, b. 3, files 2-3.

³³ *Ibid.*, b. 2, file 4.

³⁴ The prayer, with strong rural content, read: «The day has risen by winning the dark night. So we have won sleep and we are rise up to live, to move, to do Thy will. Now everything is clear and bright because You, God, you brought out again your Sun. In the same way you do shine in our hearts the light of truth, because even they become clear, bright and good. And the creature comes back at their work: birds to nests, to songs, bees to flowers, oxens to the plow. And what shall we do? We are small, we are ignorant, we don't know nothing. But now we want to learn to be a day hard workers, wise men. And so from now we will study, we will do our chores, we will obey with joy, as Jesus child. And You helps us to maintain the good intentions. But above all, Lord, we recommend you our soul. They tell us You created it infinitely pretty, and that it must not die. Give us, therefore, to keep it so pure and pretty, to make it more and more rich in goodness, because one day may shine like a star in heaven. O God, what we ask for us, we ask for everyone, because you told us that we are all brothers» (G. Lombardo Radice, *Athena fanciulla: scienza e poesia della scuola serena*, Firenze, Bemporad, 1931, pp. 33-34).

³⁵ Buseghin, *Cara Marietta... Lettere di Alice Hallgarten Franchetti (1901-1911)*, cit., p. 107.

Montesca was adorned with reproductions of paintings by Raphael and English pre-Raphaelites who had as subjects Baby Jesus or the Virgin Mary.

About the scope of *intuitus*, activity and educational heritage of Alice Hallgarten Franchetti very little was written. This allowed the Baroness to be relegated to the back burner of pedagogy along with other important and illustrious *minor* authors.

Here, for appropriate reasons of space, only the most salient aspects of the two rural schools Montesca and Rovigliano have been evidenced, obviously being aware of the need to fill the gaps on historiography, for example, on Montessori influences³⁶, on the social role operated by Franchetti institutions (Kindergartens, Schools and Canvas Umbrian Laboratory) in the first half of the twentieth century rather than the need of having to give voice to the history of all those teachers who identified themselves in the epitaph wished for Alice: *Pertransiit benefaciendo*.

³⁶ About the influence of Maria Montessori and her pedagogy of freedom on Montesca schools and Rovigliano see, in particular, the F. De Giorgi works: *Maria Montessori modernista*, «Annali di Storia dell'educazione», vol. 16, 2009, pp. 200-203; Id., *Montessori. Dio e il bambino e altri scritti inediti*, Brescia, La Scuola, p. 34.

Per una pedagogia della trasmissione culturale. Una discussione intorno al nesso editoria-libertà

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For a pedagogy of cultural transmission. A discussion about the relationship between publishing and freedom

ABSTRACT: With this work the autor intends to examine one of the most important links that have gone through the whole history of the press until now. In particular, the author has tried to highlight how this relationship, far from being finished, was affected especially after World War II, the great regional differences and policies that have influenced the history of many countries. Studies devoted to the Arab countries, the Argentine Peronism and the dictatorship of the generals, the long and troubled relationship between the poet Pasternak and Italian publisher Feltrinelli emphasize that freedom often has been endangered by the policy and how the publishing had to pay a high price to defend its space. The paper also highlights the diversity among cities and regions most accustomed to freedom of thought, such as Beirut and Lebanon, and cities and regions which have suffered a severe censorship also accompanied by religious reprisals.

EET/TEE KEYWORDS: Publishing; Censorship; History of freedom; Pasternak; Cortázar; World War II; XXth Century.

L'ospite d'onore al Salone del Libro di Torino per l'anno 2016 avrebbe dovuto essere l'Arabia Saudita, ma sulla scorta delle polemiche nate nelle settimane precedenti l'apertura, dovute alla condanna a morte di un giovane saudita per avere partecipato quando era minorenne a una manifestazione contro il regime di Riad, il consiglio di amministrazione della Fondazione che gestisce l'evento si era orientato per il ritiro dell'invito. A nulla era poi valsa l'immediata reazione dell'ambasciatore dell'Arabia Saudita a Roma, che rivolgendo un appello all'Italia a non interferire negli affari interni di un altro

Paese aveva sottolineato come non di reati d'opinione si stesse discutendo ma di reati comuni alcuni dei quali reiterati e gravi, se il reintegrato direttore Ernesto Ferrero aveva confermato il ritiro dell'invito e, per evitare ulteriori imbarazzi, si era poi orientato a ospitare non un Paese specifico ma in generale la letteratura araba¹.

Anche la Buchmesse di Francoforte aveva avuto nell'edizione del 2015, dove la nazione ospite era stata l'Indonesia il più popoloso Paese musulmano, momenti di tensione sfociati poi in uno scontro aperto quando la Repubblica islamica dell'Iran aveva ufficialmente cancellato la sua partecipazione alla Fiera a causa dell'invito rivolto a Salman Rushdie a tenere il discorso inaugurale. La scelta di Rushdie da parte del direttore Jürgen Boos era apparsa doverosa nell'anno aperto con la strage dei redattori del giornale satirico «Charlie Hebdo» e per dare seguito alla volontà degli organizzatori della Buchmesse di dedicare quella edizione alla libertà di pensiero e di espressione². In quella occasione Rushdie non si era sottratto alla necessità di sottolineare, ancora una volta, come esistessero elementi centrali della civiltà – la libertà di parola e la libertà di espressione – che non ammettevano alcuna trattativa, ma aveva anche messo in guardia dalle semplificazioni ricordando che in Occidente il peggiore attacco contro la libertà di pensiero venisse da quegli intellettuali sostenitori di una libertà «frutto solo di specifiche culture, di certi momenti storici, e che ha valore solo in certi Stati e non in tutti»³.

La conferma di queste parole arriverà da altre denunce che proveranno l'ampliamento di un conflitto esteso anche all'India, dove autori e case editrici indipendenti sempre più spesso finiscono nel mirino di gruppi di estrema destra induista, e alla Russia⁴.

¹ M. Bardesono, *Torino dice no all'Arabia Saudita*, «Corriere della Sera», 7 ottobre 2015. L'articolo, dopo queste brevi notizie, si dilungava con molta maggiore circospezione sulle vicende legate alle solite tangenti e ai dati alterati della affluenza del pubblico.

² R. Polese, *L'Iran boicotta la Buchmesse*, «Corriere della Sera», 12 ottobre 2015. La *fatwa* emessa nel 1989 dall'ayatollah Khomeini autorizzava ogni musulmano in ogni parte del mondo a uccidere Rashdie reo di avere scritto un libro blasfemo come *I versi satanici*. La *fatwa* causerà la morte del traduttore giapponese, il ferimento a Milano del curatore Ettore Capriolo e l'attacco non mortale all'editore norvegese. Dopo un periodo di sospensione i mullah iraniani sono tornati a proclamare ancora valida la *fatwa*, mentre nel 2014 le autorità saudite hanno convocato a Riad l'ambasciatore della Repubblica ceca per deplorare la nuova traduzione de *I versi satanici* e chiedere di fare il possibile perché il libro venisse ritirato.

³ R. Polese, *Appello di Rushdie: «La libertà di parola non è trattabile»*, «Corriere della Sera», 14 ottobre 2015.

⁴ Cfr. l'articolo della scrittrice Nilanjana S. Roy, *L'India violenta uccide la libertà. Scrittori in rivolta*, «la Repubblica», 15 ottobre 2015, dove vengono denunciati la messa al bando di libri, il saccheggio di tipografie e case editrici, sino all'uccisione di giornalisti e autorevoli studiosi. Per la Russia si veda l'articolo di Maria Nadotti, dedicato al premio Nobel Svetlana Aleksievic, in cui si accenna anche alla situazione in Ucraina e in Bielorussia, *Aleksievic. La scrittura come protesta interiore*, «la Repubblica», 9 ottobre 2015.

Gli esempi appena citati, ai quali naturalmente se ne potrebbero aggiungere molti altri, ripropongono con forza quel nesso tra editoria e libertà che attraversa tutto il dibattito sulla storia delle idee e del consenso politico. Un legame che già si era evidenziato e sviluppato nello specifico e violento attacco ai libri sacri, ai libri scritti da filosofi e storici, ai volumi capaci di rappresentare una cesura, e quindi anche un pericolo, per una lettura meno ingessata e più aperta e innovativa.

Il fumo e le fiamme che si levavano dai roghi sarebbero stati la testimonianza della tenace e violenta resistenza alla libertà di pensiero⁵ e la conferma, come è dimostrato dal *De iure et more prohibendi* del gesuita Jacob Gretser⁶ e dalle ricerche di studiosi contemporanei⁷ che la pratica della distruzione dei libri ha riguardato e riguarda tutte le ideologie, religioni, regimi politici.

Sarà tuttavia con la diffusione della stampa, l'ampliamento delle tipografie e la nascita delle prime importanti case editrici che il rapporto tra editoria e libertà sarebbe stato proiettato su uno schermo più ampio dove gli attori non erano più cerchie ristrette di intellettuali ma un folto pubblico di lettori intorno al quale si avviava la lunga e mai conclusa battaglia per il consenso. Emergevano figure poco conosciute il cui contributo consentiva di ridisegnare radicalmente i confini del dibattito pubblico⁸, si diffondevano fogli, ballate, incisioni di questi nuovi protagonisti, la parola libertà appariva con sempre maggiore frequenza sulle testate di giornali. L'editoria rinvigoriva dunque la lotta per la libertà ma ben presto si sarebbe trovata ad affrontare due nodi ineludibili: in che modo, soprattutto la stampa, avrebbe utilizzato questa libertà e sino a che punto gli stessi editori sarebbero stati disposti, se minacciati nei propri interessi economici, a estendere quelle prerogative.

Problemi che si ripropongono con maggiore forza e anche con più intensa tensione e drammaticità negli stati e nei territori dove la presenza politica e religiosa diventa, attraverso la censura e il controllo di tutti i mezzi di informazione, particolarmente pervasiva. Ed è proprio sulla specificità delle questioni e della storia locale, dove si riscontrano nel passato come nel presente

⁵ Sui roghi di libri molto è stato scritto, si vedano comunque: L. Löwenthal, *I roghi di libri. L'eredità di Calibano*, Genova, Il melangolo, 1991; L. Canfora, *Roghi di libri. Rilettura del Dictionnaire des livres condamnés au feu di Gabriel Peignot*, in *Il fuoco nell'Alto Medioevo*, Settimane di studio della Fondazione italiana di studi sull'Alto Medioevo, LX, Spoleto 12-17 aprile 2012, Spoleto, Fondazione Centro italiano di studi sull'Alto Medioevo, 2013, pp. 889-903.

⁶ Luciano Canfora definisce Gretser «un leader della controffensiva cattolica», «ispiratore e suggeritore ascoltato nell'allestimento dell'*Index librorum prohibitorum* pubblicato a Madrid nel 1612, uno dei più importanti "Indici" post-tridentini», in Canfora, *Roghi di libri. Rilettura del Dictionnaire des livres condamnés au feu di Gabriel Peignot*, cit., p. 890.

⁷ Con lo stesso titolo, ma con un taglio diverso e trattando periodi storici differenti, cfr. anche L. Canfora, *Libro e libertà*, Roma-Bari, Laterza, 2005; A. Petrucciani, *Libri e libertà. Biblioteche e bibliotecari nell'Italia contemporanea*, Manziana (Roma), Vecchiarelli, 2012.

⁸ Era il caso della controversa figura di John Wilkes. Su Wilkes e le nuove sfide per l'editoria si veda il capitolo *Viva la libertà* in A. Pettegree, *L'invenzione delle notizie. Come il mondo arrivò a conoscersi*, Torino, Einaudi, 2015, pp. 401-424.

i maggiori contrasti e resistenze ai cambiamenti, che gli studi più recenti, attraverso monografie, raccolte di documenti, testimonianze e autobiografie, hanno focalizzato la propria attenzione.

A questo proposito la traduzione del volume di Franck Mermier – docente universitario, autore di studi acuti, direttore di diverse istituzioni culturali arabe – *Il libro e la città. Beirut e l'editoria araba* può essere salutata come un evento di notevole interesse rappresentando l'unica ricerca ampia, ricca di dati e considerazioni, che si possa leggere in Italia su questo argomento⁹. Una analisi anche molto complessa che per la disomogeneità del mondo arabo deve tenere conto, prima di arrischiarsi in sbrigative conclusioni, dei costi commerciali, dei rischi di censura, delle vicissitudini politiche che a volte limitano l'accesso a determinati mercati nazionali. Fenomeni che portano l'autore a esaminare altre peculiarità dell'editoria araba: la difficoltà di diffusione del libro, in parte dovuta alla debolezza della rete di vendita, la scarsità delle librerie e gli ostacoli nel riscuotere il pagamento delle fatture. Questioni che evidenziano poi la forte frammentazione di quella editoria. Se queste sono alcune caratteristiche di un panorama "esterno" in cui si devono muovere tutti gli operatori dell'attività libraria, Mermier è anche attento a evidenziare le peculiarità "interne" di una cultura capace di condizionare pesantemente sia il lavoro delle case editrici che la qualità dell'offerta di scrittori, poeti, saggisti. Anche il ricorso ricorrente, e in alcuni Paesi in modo quasi totale, al finanziamento privato e soprattutto pubblico, contribuisce a ridurre gli investimenti nella diffusione di opere la cui importanza risiede più nella volontà degli autori di farsi conoscere che nella qualità dei contenuti affidandosi ad un ambiente precostituito di lettori che solo occasionalmente potrà ampliarsi e includere nuove possibilità di partecipazione. Rimandando a un saggio di Ahmad Beydoun, pubblicato nel 2011 sulla rivista «Kalamun», Mermier accoglie l'idea secondo cui l'ambiente editoriale finisce per agire da filtro di una cultura che può restringere o agevolare l'accesso della creazione intellettuale alla sfera pubblica. A questo proposito l'autore fa gli esempi del freno che l'importanza attribuita alle opere del passato può portare a una migliore conoscenza della società araba contemporanea, della esiguità delle traduzioni, dell'ostracismo verso il settore delle scienze umane e sociali che rappresenta poi il parente povero di quella editoria¹⁰.

Da questo quadro di riferimento generale, che Mermier sviluppa nell'*Introduzione* e nel capitolo *L'editoria araba come indicatore culturale*, non può che derivare una netta distinzione rispetto all'editoria occidentale. L'assenza infatti di importanti e sviluppate concentrazioni editoriali e, per altro verso, la presenza di numerose imprese di piccole dimensioni ha portato, sino ad ora,

⁹ F. Mermier, *Il libro e la città. Beirut e l'editoria araba*, Messina, Mesogea, 2012.

¹⁰ A questo proposito Mermier riporta la dichiarazione disincantata di Hichem Djait: «Benché la cultura araba si caratterizzi per la sua indigenza, tuttavia è sufficiente a nutrire il proprio pubblico il cui livello intellettuale è bassissimo», in H. Djait, *La crise de la culture islamique*, Paris, Fayard, 2004, pp. 74-75.

alla conclusione per cui solo pochissime case editrici sono in grado di capire il mercato panarabo e panislamico. Un mercato che, inoltre, per la mancanza di una ditta di distribuzione capace di farsi carico della commercializzazione di editori molto differenti, aggiunge una ulteriore limitazione all'esistenza pubblica di molte produzioni editoriali, penalizzando il segmento più innovativo e rispecchiando più che orientando una domanda nuova di lettura. Mermier comunque non dimentica, e a questo proposito ha pagine molto interessanti, di confrontare le linee generali del suo discorso con la sfaccettata realtà storica dei paesi presenti in quell'area. Solo questa analisi dettagliata consente al lettore, a partire dal capitolo dal titolo significativo ed eloquente *L'Egitto scrive, il Libano stampa, l'Iraq legge*, di riflettere sull'importanza che il fattore politico e la presenza religiosa hanno avuto nel condizionare uno sviluppo editoriale sempre soggetto a queste due varianti¹¹. L'emergere dell'Egitto e del Libano e la continua competizione tra Il Cairo e Beirut sono diventate sino a oggi una delle più importanti cartine di tornasole per analizzare non solo impostazioni molto diverse nello sviluppo del settore editoriale, ma anche condizioni culturali specifiche capaci di influenzare i diversi termini che, sino ad oggi, ne hanno regolato lo sviluppo¹². I cambiamenti politici di uno Stato, le restrizioni o alcune timide aperture nel campo minato della libertà di stampa non fermano le ricadute al perimetro della nazione interessata ma, in questa parte del mondo, finiscono sempre per coinvolgere una porzione più ampia di territorio. Così avvenne negli anni cinquanta/sessanta, quando Beirut cominciò a soppiantare progressivamente Il Cairo nel ruolo di centro propulsore del commercio del libro arabo, e così ancora si ripeterà quando il proverbiale controllo dell'editoria egiziana da parte dello Stato vedrà inasprire le restrizioni imposte dal regime nasseriano e al contempo aumentare per i propri bilanci gli effetti nocivi di

¹¹ L'impero ottomano, soprattutto dopo il divieto emanato dal sultano Bayezid II, rimase a lungo refrattario alla stampa di opere in arabo anche se fu consentito alle comunità ebraiche e cristiane di impiantare tipografie dove venivano usati caratteri non arabi. Agli impedimenti di carattere religioso, si temeva soprattutto che il Corano venisse alterato dalla produzione meccanica, si aggiunse la resistenza corporativa dei copisti minacciati dalla concorrenza. Neanche le timide aperture successive, con l'approvazione dal 1726 delle opere stampate in arabo, cambiarono in modo sostanziale questa piega. A questo proposito le date riportate da Mermier per documentare l'introduzione della stampa nella penisola arabica, nel Maghreb e negli altri Stati sono molto eloquenti: il 1877 per lo Yemen, il 1845 per la Tunisia, il 1864 per il Marocco, il 1830 in Iraq, e bisogna risalire addirittura al 1948 per trovare l'installazione della prima tipografia in Kuwait.

¹² Sulla introduzione della stampa in Egitto e in Libano, sulla breve ma importante presenza francese e, soprattutto, sui motivi della polarizzazione della produzione araba a Il Cairo e poi, con un passaggio di testimone che ha implicato un importante spostamento culturale, a Beirut cfr., oltre ai due capitoli – *L'Egitto scrive, il Libano stampa, l'Iraq legge e Beirut: spazio pubblico del mondo arabo* – del volume di Mermier, anche J. Cole, *Printing and Urban Islam in the Mediterranean World 1890-1920*, in L. Tarazi Fawaz, C. Alan Bayly (edd.), *Modernity and Culture. From the Mediterranean to the Indian Ocean*, New York, Columbia University Press, 2002, pp. 344-364; G.N. Atiyed, *The Book in the Modern Arab World: the Cases of Lebanon and Egypt*, in Id. (ed.), *The Book in the Islamic World. The Written Word as Communication in the Middle East*, New York, University of New York Press, 1995, pp. 233-239.

una selvaggia pirateria praticata dai paesi vicini. La forbice tra le due città e le due nazioni prenderà ad allargarsi e a quella impronta marcatamente statale dell'editoria egiziana, che faceva riferimento a un mercato principalmente nazionale, a un apparato tecnologico e a una qualità della produzione scadenti con l'impiego di abbondante manodopera a buon mercato, si sarebbe specchiata l'editoria libanese privata rivolta ai mercati esterni, sufficientemente avanzata e integrata sul piano tecnologico, competitiva sul piano della qualità. Anche nel mondo arabo e islamico, quindi, la variabilità dell'importanza per il commercio librario e la produzione editoriale dipendeva e dipende dal grado di libertà politica che caratterizza città e nazioni. Su questi punti il volume di Mermier offre al lettore numerosi argomenti di riflessione. Si pensi alle pagine dedicate alle dure restrizioni imposte alla distribuzione dei libri sciiti in paesi come l'Iraq o l'Arabia Saudita, alla pesante censura a cui è stata sottoposta, sino quasi a scomparire, l'editoria sciita in Egitto dopo i divieti degli anni ottanta, alla chiusura totale adottata dall'Arabia Saudita¹³. L'avvento dello Stato-editore, come viene definito da Abdelkader ben Cheikh una delle caratteristiche del sistema editoriale arabo sviluppatasi a partire tra gli anni sessanta e settanta, ha finito poi per regolamentare in modo ancora più rozzo e feroce quel fragile rapporto tra editoria e libertà. I brevi periodi caratterizzati da un relativo ammorbidimento politico sono stati spesso seguiti da lunghi e duri anni di repressione che hanno finito per relegare le polverose istituzioni statali preposte alla pubblicazione di libri in un ruolo del tutto marginale. A questo proposito, Mermier dedica molte pagine alla situazione siriana e ai continui compromessi al ribasso a cui si devono sottomettere le case editrici progressiste, o comunque non governative, strette tra l'adesione incondizionata al potere politico e la richiesta di mediazione con un regime autoritario che intende annettersi e controllare qualsiasi attività intellettuale. Una condizione che accomuna, naturalmente con le differenze dovute alla storia di ogni Paese, la Siria al Kuwait, all'Oman, allo Yemen, dove la crescente importanza assunta dalle fiere della penisola arabica a scapito di quelle dell'Iraq, della Libia o dell'Algeria ha finito per imporre nuove restrizioni al mercato del libro. Tutti questi suggerimenti sono poi raccolti e sviluppati dall'autore nel paragrafo *Una censura multiforme* dove si analizzano i modi della censura di declinare a monte e a valle i tre tabù sempre presenti: la religione, la politica e il sesso¹⁴. Un esito pervasivo capace di condizionare e delimitare attraverso l'autocensura, secondo lo scrittore libanese

¹³ Per la produzione sciita in Libano si veda il saggio di B. Scarcia Amoretti, *La produzione editoriale sciita in Libano negli ultimi quindici anni*, «Oriente moderno», nn. 1-6, 1995, pp. 115-151, che tuttavia si riferisce a un periodo già trascorso. Sulle continue vessazioni di editori e scrittori cfr. gli articoli di A. Ray, *Ucciso a Dacca l'editore laico anti islamisti*, «Corriere della Sera», 1 novembre 2015, a proposito della uccisione di F.A. Dipon, e F. Battistini, *L'Iran ama la poesia ma castiga i poeti*, «Corriere della Sera», 3 novembre 2015.

¹⁴ Cfr. il paragrafo *Una censura multiforme*, in Mermier, *Il libro e la città. Beirut e l'editoria araba*, cit., pp. 105-114.

Abbas Beydoun, il campo della creatività della ricerca componendo «un ordine culturale che impone i propri schemi e i propri limiti di pensiero»¹⁵.

Se pure in modo diverso il tema della libertà di pensiero, della censura e delle accanite battaglie sostenute dagli editori per difendere uno spazio sempre messo in pericolo dai mutamenti politici è presente anche nel volume del poeta, intellettuale, militante antifascista, editore Carlos Barral che il Saggiatore ha opportunamente presentato al pubblico italiano¹⁶. Le pagine, scritte in tempi diversi, risentono tutte della riflessione, o forse piuttosto dell'ossessione come preferiscono chiamarla i curatori, sul tempo che passa e sulla difficoltà di mantenere viva la memoria. È su questa trama che Barral dispone la fitta rete dei ricordi recuperando la sua prima educazione, la presenza della Chiesa, l'atmosfera asfittica di una società chiusa nella arcigna difesa delle proprie prerogative. Anche da qui il suo precoce amore per la letteratura, e soprattutto per la poesia, mai elaborato e vissuto, tuttavia, come un ripiego o un disimpegno. Egli stesso poeta e traduttore¹⁷, Barral saprà sfruttare al meglio l'occasione offertagli dalla direzione della casa editrice ereditata dal padre. Un ruolo di guida sollecitato da Giulio Einaudi, figura decisiva per orientare le scelte del giovane editore e per legarlo, anche con rapporti di amicizia, a

¹⁵ «L'esito della censura d'ispirazione islamista sullo statuto simbolico del libro potrebbe essere così riassunto: la demonizzazione che colpisce certi libri e ne assicura la diffusione non commisurata al loro contenuto è lo specchio rovesciato della sacralizzazione che investe il Libro e, per contro, scredita coloro che si allontanano dalla sua aurea», in *ibid.*, p. 112.

¹⁶ C. Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, a cura di R. Baravalle, P. Collo e G. Felici, Milano, Il Saggiatore, 2011. Nella *Nota dei curatori* si sottolinea come il volume sia un'ampia selezione dei tre libri di memorie *Años de penitencia*, *Los años sin excusa*, editi da Alianza Editorial, e *Cuando las horas veloces*, uscito per Tusquets editore nel 1988. I tre libri sono stati poi riuniti in C. Barral, *Memorias*, prologo di J.M. Castellet e A. Oliart, Barcellona, Península, 2001. A questi volumi bisogna aggiungere *Penúltimos castigos*, Barcellona, Seix Barral, 1983, unico romanzo scritto da Barral, «sorta di autobiografia morale – come scrive Alberto Oliart – nella quale l'autore si ricrea nel personaggio che porta il suo nome». In Italia Il Saggiatore, per iniziativa di Alberto Mondadori, aveva pubblicato nel 1964 nella *Biblioteca delle Silerchie* la raccolta di poesie *Diciannove immagini della mia storia civile* tradotta da Dario Puccini e con la copertina disegnata da Bruno Binosi. Nella *Nota* introduttiva a questo volume si parlava della poesia di Barral come di una «poesia essenzialmente di secondo grado, che si innesta, con un passo estremamente arduo e su un tessuto di confessione e di memorie, in una esperienza civile, sociale, quasi collettiva». Temi poi ripresi e sviluppati da Dario Puccini nell'intervento *Le due barche di Carlos Barral*, «Belfagor», vol. XLVI, n. 4, 1991, pp. 457-461. L'ultima presenza in catalogo di Barral è un volumetto per l'infanzia, *Nefelibata che viveva tra le nuvole*, illustrazioni di Serena Mulazzani, Milano, Salani, 2010.

¹⁷ Numerose le traduzioni, da Molière e da Rilke ad esempio, e altrettanto forti gli influssi del poeta barocco spagnolo Gabriel Bocángel, di Valéry, di Eliot e Eluard, di Vincent Aleixandre. Più nascosti, ma egualmente importanti, le suggestioni di Jorge Guillén e Luis Cernuda che ritroveremo negli anni di quella «scuola di Barcellona» dove scriveranno e pubblicheranno José Augustin Goytisolo, Carlos Barral e Jaime Gil de Biedma, il poeta che gli sarà più vicino. Sulla difficile e poco remunerativa attività di traduttore cfr. Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., pp. 105, 126-129. Su Barral poeta si veda quanto scrive Paz, *Carlos Barral*, in Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., pp. 11-13.

una parte rilevante della cultura letteraria italiana¹⁸. Sarà attraverso lui, o anche attraverso lui, che Barral allargherà le conoscenze italiane coinvolgendo in alcuni progetti Feltrinelli, Bompiani, Alberto Mondadori e poi Vittorini, Moravia, Eco. Sodalizi riusciti e duraturi capaci di stimolare e preparare la lettura di autori come Belli, Verga, Svevo, Leopardi, Gramsci, stabili presenze nel catalogo dell'editore spagnolo.

Queste relazioni e la creazione del Premio internazionale degli editori e del Premio Formentor aiutarono Barral a resistere e a far uscire la letteratura spagnola dal chiuso della dittatura franchista e dal suo isolamento provinciale quando, per dirla con le parole del futuro editore barcellonese, Madrid gli apparve «più brutta e soprattutto più deprimente di quanto io supponessi»¹⁹. Alla lunga coesistenza della Spagna con il franchismo – anche se in gioventù a Barral «le genti che abitavano il cuore della Spagna sembravano assolutamente inadeguate, sia sotto il profilo fisico che morale, a fungere da supporto a una mitologia nazionalista» – nel libro sono dedicate numerose pagine che non rappresentano una ricostruzione storica di quel periodo, quanto piuttosto acute considerazioni antropologiche sui cambiamenti portati da quell'incontro²⁰. La stessa scelta di considerarsi un «compagno di strada», rispetto al marxismo e al Partito comunista, rivendicando un anarchismo esistenziale che gli consentisse maggiore adesione alla sua filosofia di vita, chiariva quale idea di editoria Barral avesse in mente. Una editoria che per tanti anni non si sarebbe trovata di fronte la

¹⁸ Su Einaudi, «credo che si possa dire che sia stato l'editore più importante della sua epoca», Barral tornerà più volte in *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., pp. 210, 212, 262, dove si svela anche parte del carattere dell'editore torinese: «Giulio, poco a poco, mi parve come una delle persone più inquiete che avessi mai conosciuto, cosa che si rifletteva anche nel suo modo di prendere decisioni, sempre a rischio di minuscole fratture, di indecisioni e dubbi, nel quadro, però, di una linea retta sulle scelte importanti». Della presenza e del lavoro di Einaudi «non erano comunque solo gli editori ma anche tutti i chierici dell'editoria italiana a beneficiare del prestigio derivante dalla sua reputazione e dalla magnificenza del catalogo». Barral ricorda anche la lunga amicizia con Calvino e i rapporti con altri einaudiani, da Bollati a Foà, mentre di Davico Bonino sottolinea il suo essere «troppo ambizioso per accontentarsi di ruoli non di primissimo piano e che sembrava essere sempre in una situazione di provvisorietà».

¹⁹ Il ricordo del primo viaggio nella capitale spagnola per Barral rimase indelebile, segno costante di una avversione che continuerà nei decenni successivi, cfr. Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., p. 86. Ma sui limiti di Madrid in quegli anni e sul grande lavoro di sprovvincializzazione compiuto da Barral sono da rileggere anche le parole di Vargas Llosa: «Nella Spagna odierna, aperta a tutti i venti e agli influssi planetari, è difficile capire tante cose. Ma quelli come me, che sbarcavano a Madrid nel 1958 rimanendo sorpresi dalla vita culturale ancora più ristretta e pudibonda di quella che avevano lasciato a Lima o a Tegucigalpa, hanno compreso quanto furono decisivi gli sforzi di Carlos Barral per abbattere quei muri, per offrire al lettore spagnolo il meglio che si pubblicava nel mondo e per fare uscire dall'anonimato e dalle catacombe della penisola tanti giovani scrittori repressi», M. Vargas Llosa, *Carlos Barral*, in Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., p. 10.

²⁰ Si vedano le pagine efficaci della prima parte raccolte in *Anni di penitenza*, pp. 31-120, dove Barral descrive l'ambiente familiare e scolastico, la presenza pervasiva della Chiesa, il suo confronto con la lingua catalana. Tutti elementi che contribuiranno più in generale a definire e formare il rapporto tra la Spagna e il franchismo.

brutale repressione adottata dagli Stati arabi, ma le continue «punzecchiature» di una censura capace di dilatare i tempi, di rispedire al mittente i testi, di costringere a tanti patteggiamenti. Tutto questo non impedirà a Barral di vincere le sue battaglie, e si pensi solo allo scontro per imporre la pubblicazione di giovani scrittori sudamericani, ma non poche volte a costo di mutilazioni, sostituzioni, cambiamenti che finivano per dare al testo un diverso aspetto stilistico e variazioni nel ritmo narrativo. Il corpo a corpo con il Servicio de inspección de libros arriverà in un caso addirittura a «cicatizzare» gli interventi tanto da non essere più in grado l'opera di riammettere, se non con grande difficoltà, le espressioni che le appartenevano nella primitiva redazione²¹.

Il volume *Golpe ai libri*, scritto da Judith Gociol e Hernán Invernizzi con l'introduzione di Horacio Gonzáles e dedicato alla repressione della cultura argentina durante gli anni della dittatura militare compresi tra il 1976 e il 1983²², sembra continuare i ricordi e le riflessioni di Carlos Barral sul franchismo se non poggiasse su una solida e ampia documentazione ritrovata in edifici di organismi statali e in scantinati, dove i funzionari militari l'avevano accantonata o dove era stata sottratta alla distruzione da bibliotecari competenti e archivisti appassionati. La lettura delle carte permette di focalizzare l'attenzione sulle diverse sfumature della censura e poi sulla peculiarità di quella argentina. Come scrivono Gociol e Invernizzi i funzionari militari intendendo la politica culturale più come coercizione che come egemonia, sceglievano poi attraverso l'impegno e il fattivo intervento della burocrazia statale di sperimentare «un modo di censurare la propria censura, lasciando i propri atti senza testimonianze scritte». È quindi convinzione degli autori che alla sparizione sistematica delle persone sia corrisposta una altrettanto sistematica sparizione di simboli, discorsi, immagini e tradizioni. Secondo questa politica alle centinaia o migliaia di scrittori argentini vittime del terrorismo di Stato agli intellettuali scomparsi, assassinati, arrestati, torturati, censurati, esiliati, emarginati, già dal 1976 le autorità si preoccuparono di fornire un inquadramento legale alle proposte repressive²³. Pensiamo alla Direzione generale per le pubblicazioni, l'organismo incaricato del controllo culturale alle dipendenze del Ministero degli Interni che coordinava a livello nazionale l'ispezione su ogni genere di materiale stampato. Un organismo complesso che poteva contare sulla collaborazione di diverse sezioni sino a

²¹ Cenni più espliciti al rapporto con la censura in Barral, *Il volo oscuro del tempo. Memorie di un editore poeta 1936-1987*, cit., pp. 33, 160, 168, 214, 217.

²² J. Gociol, H. Invernizzi, *Golpe ai libri. La repressione della cultura durante l'ultimo dittatura militare in Argentina (1976-1983)*, introduzione di Horacio Gonzáles, Roma, Nova Delphi, 2015.

²³ Sulle violenze subite dagli intellettuali argentini si veda il capitolo *Persecuzioni a titoli e autori*, pp. 255-310, dove sono descritte anche le censure patite da scrittori di altri paesi, come il peruviano Mario Vargas Llosa. Inoltre al termine del volume sono raccolti i testi che hanno fatto parte nel 2001 del ciclo di conferenze *Un golpe a los libros* in cui scrittori e poeti testimoniarono sulla letteratura dell'esilio, sulle biblioteche perdute, sul lessico della censura, sui poeti desaparecidos, cfr. *Sguardi*, in Gociol, Invernizzi, *Golpe ai libri. La repressione della cultura durante l'ultimo dittatura militare in Argentina (1976-1983)*, cit., pp. 315-361.

richiedere l'intervento della Direzione per il Culto qualora le opere relazionate avessero bisogno di un approfondimento degli uffici ecclesiastici. La necessità di affidarsi ad un apposito ufficio era, d'altra parte, ritenuto conseguenziale date le relazioni non semplici tra dittatura e autorità ecclesiastiche che agiranno non sempre come un corpo omogeneo²⁴. Ne derivava una zona grigia fatta di accordi verbali e pochi documenti dove gli uffici governativi lasciavano libera la Chiesa di intervenire sugli aspetti dottrinali mantenendo comunque un rigido controllo sull'attività delle case editrici cattoliche.

Una modulazione sulla quale gli autori insistono sottolineando come la politica di controllo culturale durante la dittatura tendesse a rispettare le giurisdizioni salvaguardando i principi fondamentali di divisione geografica, amministrativa e politica dello Stato e del governo. Questa convivenza e sovrapposizione tra i diversi organi si riscontrava poi, con grande affollamento e continuità, nel territorio dell'editoria scolastica. Settore molto delicato sia per l'importanza cruciale che le autorità attribuivano ai libri in quanto strumenti di diffusione ideologica, e in questa cornice la letteratura infantile era costantemente tenuta sotto controllo, sia per la fetta enorme di mercato – fra il 1980 e il 1984 la produzione dei libri nel settore educativo rappresentò il 72,3% del totale – capace di condizionare economicamente molti investimenti in quell'area.

All'Argentina sono stati dedicati anche altre ricerche, interventi, testimonianze, che pur non affrontando in modo specifico il tema della libertà nella storia editoriale di quel paese aggiungono tasselli importanti a una riflessione complessiva. Il volume di Eugenia Scarzanella, *Abril. Da Peron a Vileda: un editore italiano a Buenos Aires*²⁵, presentato dall'ambasciatore il Italia Torcuato S. Di Tella²⁶, segue le vicende degli esiliati Cesare Civita, Paolo Terni e Alberto Levi che, creando la Editoriale Abril, misero le basi per un grande successo nel campo dei libri e delle riviste. Un successo che si sarebbe espanso anche in Brasile e Messico.

La ricerca, iniziata come tentativo di ricostruire le vicende delle tante riviste popolari e dei fumetti pubblicati a Buenos Aires, ha spinto l'autrice a esplorare più in dettaglio i primi anni di vita della casa editrice per affrontarne poi la storia complessiva le cui sorti rimarranno indissolubilmente legate ai travagliati avvenimenti argentini: dal peronismo all'ascesa del generale Rafael Vileda con il golpe del 1976. Un percorso di ricostruzione non facile per l'impossibilità di

²⁴ Numerosi i riferimenti al rapporto tra Chiesa e dittatura, si vedano i paragrafi *Chiesa e case editrici cattoliche*, *La Bibbia Latinoamericana*, e *La collana Dependencia* dedicato alla casa editrice Guadalupe, pp. 145-168. Altri richiami alle pagine 183-190.

²⁵ E. Scarzanella, *Abril. Da Peron a Vileda: un editore italiano a Buenos Aires*, presentazione di T.S. Di Tella, Roma, Nova Delphi, 2013.

²⁶ Torcuato S. Di Tella, sociologo e storico, docente nell'Università di Buenos Aires e in alcune università cilene, inglesi e statunitensi, è autore di volumi pubblicati anche in Italia da Feltrinelli e Ediesse. Prima di essere nominato ambasciatore ha rivestito la carica di ministro dei Beni Culturali. Cfr. T.S. Di Tella, *Abril e l'emigrazione antifascista in Argentina*, in Scarzanella, *Abril. Da Peron a Vileda: un editore italiano a Buenos Aires*, cit., pp. 7-8.

consultare la documentazione aziendale, in parte dispersa e in parte distrutta da un incendio, a cui l'autrice cercherà di ovviare sperimentando anche gli strumenti della storia orale. In particolare viene seguita la figura di Cesare Civita. I suoi interessi per il cinema, e l'amicizia in questo campo con Alberto Mondadori, Mino Monicelli, Alberto Lattuada, i legami con la massoneria e la poliedrica esperienza con editori italiani che tornerà utile quando nel dopoguerra la casa editrice si legherà in importanti collaborazioni con Fabbri, Mondadori, Rizzoli²⁷. Proprio l'intreccio tra le vicende della Rizzoli e quelle della Abril porterà la casa editrice argentina a frequentazioni ambigue e pericolose sino alla vendita dell'azienda per interessamento, e con una parte non secondaria, di Licio Gelli²⁸. La Editorial Abril attraverserà quindi tutti gli anni del peronismo e della dittatura militare e di quest'ultima ne sperimentò anche le durezze e le minacce con bombe e attentati alla sede della casa editrice. Una situazione difficile per la famiglia Civita che per sottrarsi a ulteriori tensioni deciderà nel 1975 di abbandonare il paese per un breve periodo. La ricerca della Scarzanella tuttavia mette in evidenza come le dimensioni dell'azienda, oramai presente anche in altri paesi latinoamericani, l'ampiezza delle pubblicazioni e gli interessi economici costringessero la Abril e la famiglia Civita a venire a patti o a cercare mediazioni con i governi al potere.

Il rapporto tra editoria e libertà sarebbe diventato con il tempo più sfumato adattandosi a comprendere l'antifascismo delle origini, proprio di tanti collaboratori come Gino Germani e anche ebrei, e l'adesione ad alcune fasi del peronismo moderato.

I mutamenti e i drammi profondi che attraversarono la società argentina dagli anni quaranta alla fine degli anni settanta possono essere ripercorsi attraverso le tante riviste editate da Editorial Abril – «Claudia», «Nocturno», «Panorama», «Siete Dias», «Adan» – e dalle firme prestigiose (anche italiane) che collaborarono con la casa editrice – Oriana Fallaci, Giorgio Scerbanenco, Indro Montanelli, Alberto Ongaro e Hugo Pratt – ma possono essere anche riletti attraverso l'epistolario del narratore, poeta e saggista Julio Cortázar considerato con Borges, da parte della critica più autorevole, il maggiore scrittore argentino²⁹.

²⁷ I rapporti tra Civita e l'editoria milanese non sono ancora stati studiati con attenzione. Se ne trovano riferimenti solo in A. Mondadori, *Lettera di una vita 1922-1975*, a cura e con un saggio introduttivo di Gian Carlo Ferretti, Fondazione Arnoldo e Alberto Mondadori, Milano, 1996. Non si parla di Civita né nella biografia di Deleva dedicata ad Arnoldo Mondadori (*Arnoldo Mondadori*, Torino, UTET, 1993), né nei lavori riguardanti Fabbri (C. Carotti, G. Adriani (edd.), *La Fabbri dei Fratelli Fabbri*, Milano, FrancoAngeli, 2012; S. Marchi, G. Fabbri, *L'uomo che faceva i libri*, Milano, Bietti, 2011).

²⁸ Sugli aspetti torbidi e poco chiari di quegli anni, con particolare riferimento al ruolo di Licio Gelli nella vendita della Editorial Abril, cfr. il capitolo *Politici, militari e faccendieri alla conquista di Abril*, in Scarzanella, *Abril. Da Peron a Vileda: un editore italiano a Buenos Aires*, cit., pp. 169-204.

²⁹ J. Cortázar, *Carta carbone. Lettere ad amici scrittori*, a cura di Giulia Zavagna, Roma,

Le lettere, tradotte dalla giovane e coraggiosa casa editrice SUR e inserite in una collana che presenta molti altri importanti autori latinoamericani, compongono il ritratto di un uomo e della sua epoca, di un autore e della sua opera, di un intellettuale e del suo ruolo nella società. Gli interlocutori sono conosciuti – da Borges a Vargas Llosa, da Octavio Paz a García Márquez, da Victoria Ocampo a Juan Carlos Onetti, da José Donoso a José Lezama Lima, agli amici e amiche più cari e fraterni – e con tutti il dialogo non è mai banale e scontato, ma piuttosto, di volta in volta, basato su un registro divertente o profondo, surreale o impegnato, formale o amichevole³⁰. Ne emerge anche un Cortázar lettore dei classici e dei propri contemporanei ai quali dispensava consigli, opinioni diverse, sincera ammirazione³¹ e non mancano acuti riferimenti al mondo editoriale e a quello politico³².

La lunga permanenza in Europa e il soggiorno decennale in Francia consentirà poi allo scrittore di guardare alle drammatiche vicende politiche del suo paese con un occhio vigile ma non disincantato. Come tutti gli scrittori di lingua spagnola Cortázar denuncia di subire una doppia censura in patria e in Spagna. In una lettera del 30 dicembre 1964 rispondendo a un invito di Arnoldo Liberman, direttore della rivista «Tiempos modernos», viene colta l'occasione per chiarire la sua presa di posizione riguardo alla rivoluzione cubana e al peronismo³³. Un rapporto di adesione e di appoggio a Cuba che tuttavia non dimenticava mai di tenere ben distinti gli aspetti emozionali da quelli ideologici, i distinguo dalla necessità di dialogo. A Borges, che riconosceva il suo valore

SUR, 2013; Id., *Chi scrive i nostri libri. Lettere editoriali*, a cura di Giulia Zavagna, prefazione di Francesco Piccolo, Roma, SUR, 2014. La casa editrice romana SUR ha come progetto di tradurre o ritradurre, in collaborazione con diversi Ministeri, opere dei maggiori scrittori latinoamericani.

³⁰ Si leggano, ad esempio, le lettere dedicate dall'instancabile viaggiatore Cortázar (che visse a lungo a Parigi) alle città italiane, alla Spagna e al carattere degli spagnoli, a Cuba, in *Carta carbone. Lettere ad amici scrittori*, cit., pp. 16-18, 28, 29, 32, 33, 69, 70, 81-86.

³¹ Cfr. il suo amore per Poe e la dura stroncatura di Hesse, come anche la ripetuta insofferenza verso Ernesto Sabato. Anche con gli amici e con gli scrittori che stimava Cortázar non faceva mancare, senza mai essere offensivo, la sua schietta e critica opinione. Si vedano, ma solo come esempio, le lettere in *Carta carbone. Lettere ad amici scrittori*, a José Donoso, José Lezama Lima, Octavio Paz, Carlos Fuentes. Uno scambio intenso e di vicinanza sarà sempre con Vargas Llosa.

³² Per i riferimenti agli aspetti editoriali del suo lavoro di scrittore, oltre alle pagine già ricordate, dedicate nei due volumi al problema della traduzione, si vedano, in *Chi scrive i nostri libri. Lettere editoriali*, i ricordi degli incontri con Einaudi, Gallimard, Barral, lo scrittore Roger Caillois. Nonostante in una lettera al traduttore ed editore ispanoamericano Francisco Porrúa Cortázar dichiarasse di non avere «una mia idea sul libro» e di «essere sempre stato negato per le arti grafiche», in realtà avrebbe dimostrato un'attenzione non banale agli aspetti della composizione: dalla cura per le bozze e le copertine, alle precisazioni sull'importanza del dorso dei libri. Meno numerose ma non meno acute e interessanti, le annotazioni sui lettori, la lettura, il mercato editoriale, le meschine vedute della critica letteraria americana, cfr. *Chi scrive i nostri libri. Lettere editoriali*, cit., pp. 116, 139.

³³ «I migliori, i più lucidi scrittori e artisti cubani appoggiano la rivoluzione, e basta andare a Cuba per verificarlo. Se nel 1945 il peronismo avesse potuto contare su un appoggio analogo, io sarei stato peronista; ma non per niente il peronismo è sempre stato solo, isolato sul piano intellettuale ed estetico», in Cortázar, *Carta carbone. Lettere ad amici scrittori*, cit., p. 112.

come scrittore ma dichiarava «disgraziatamente di non potere mai avere una relazione con lui perché è comunista», Cortázar rispondeva di non sentirsi un mattone «con tutti gli spigoli a vista», capace di far combaciare e adattarsi solo ad un altro parallelepipedo, a un altro simile³⁴. Sarà questa libertà a fargli prendere subito le distanze dalla persecuzione degli scrittori da parte del regime cubano e qualche anno dopo a fare sentire la sua voce nel precipitare della situazione politica latinoamericana³⁵ dove l'Argentina, e poi il Cile, davano l'impressione di un continente senza speranza³⁶.

Se con Cortázar la dialettica tra editoria e libertà veniva declinata da una posizione di forza per la possibilità, vivendo all'estero, di sottrarsi alla sorveglianza e alla censura, mantenendo così una autonomia di giudizio e una indipendenza di movimento, con il caso Pasternak al lettore sembrerà di regredire agli anni del disgelo quando le speranze di un nuovo slancio si scontrarono con le difficili situazioni interne e internazionali.

A questo tema e in particolare alle «avventure editoriali del capolavoro di Pasternak», come recita il sottotitolo, ha dedicato una ricerca lunga e impegnativa Paolo Mancosu³⁷. Una parte del volume era stata anticipata nell'«Annale Feltrinelli» del 2013³⁸, ma ora in questo libro autonomo l'autore porta a compimento un percorso che, partito dalla indagine sulle edizioni russe pubblicate in Occidente, approda a una conferma dell'intervento della CIA nella storia della pubblicazione del *Dottor Živago*³⁹. Tuttavia, al di là della provata importanza dei documenti pubblicati su questo punto, possiamo stabilire che

³⁴ Cfr. la lettera del 20 ottobre 1968 a Roberto Fernández Rattamar, poeta e saggista cubano direttore della rivista «Casa de las Américas» del cui comitato scientifico Cortázar fece parte per anni, in Cortázar, *Carta carbone. Lettere ad amici scrittori*, cit., pp. 168-169.

³⁵ Cfr. la lettera del 9 maggio 1973 allo scrittore e critico letterario e uruguayano Ángel Rama dove concordava sulla necessità di «reagire all'istante» non condividendo comunque la durezza verso gli emigrati sudamericani in Europa molti dei quali – e il riferimento era forse anche a se stesso – «si erano dati il più possibile da fare senza per forza essere mossi dai sensi di colpa», in Cortázar, *Carta carbone. Lettere ad amici scrittori*, cit., pp. 198-203.

³⁶ Cfr. le lettere, tra il settembre 1973 e il giugno 1979, a Ida Vitale, Osvaldo Soriano, Maria Zambrano, Félix Grande, Eduardo Galeano, in Cortázar, *Carta carbone. Lettere ad amici scrittori*, cit., pp. 218, 223, 228, 246, 247.

³⁷ P. Mancosu, *Živago nella tempesta. Le avventure editoriali del capolavoro di Pasternak*, premessa di Carlo Feltrinelli, Milano, Feltrinelli, 2015. Pur nella documentata ampiezza dell'introduzione e nella pubblicazione del carteggio completo Pasternak-Feltrinelli, il volume risulta di lettura faticosa certo non aiutata dalle lunghe note poste a fine libro. Scelta che costringe il lettore a continue interruzioni del testo. Un ulteriore appesantimento è dato dal commento a ogni documento presentato.

³⁸ «Annali della Fondazione Feltrinelli» 2013, P. Mancosu, *Inside the Živago storm*. Su questa pubblicazione cfr. la recensione di A. Kerbaker, *Živago intrigo alla russa*, «Il Sole 24 Ore», 13 ottobre 2013.

³⁹ Sul ruolo della CIA cfr. ora P. Finn, P. Couvée, *The Zhivago Affair. The Kremlin, the CIA and the Battle Over a Forbidden Book*, New York, Pantheon, 2014; A. Reisch, *Hot Books in the Cold War. The CIA funded secret western book distribution program behind the iron curtain*, Budapest, The Central European University Press, 2013.

sono altre le riflessioni che meritano maggiore attenzione e che pure avevano già trovato qualche anticipazione importante⁴⁰. In particolare emergono le figure di Pasternak e di Feltrinelli. Lo scrittore e l'editore legati, malgrado qualche incomprensione poi ricomposta, dalla volontà di sfidare il potere della censura sovietica e le pressioni, da non sottovalutare anche per il clima di tensione in quegli anni⁴¹, del Partito comunista italiano⁴². Certo, alla fine, il successo del *Dottor Živago* porterà Pasternak al premio Nobel e regalerà alla casa editrice milanese la sua prima clamorosa affermazione internazionale, ma le sofferenze, le delusioni e l'umiliazione sofferte dal poeta saranno incancellabili.

A questi lavori, dedicati prevalentemente a luoghi dove il rapporto tra editoria e libertà ha subito e continua a subire continue ferite, non ha fatto seguito, per il mondo occidentale, una adeguata messe di studi. Se notevoli passi in avanti sono stati fatti per mettere meglio a fuoco i diversi gradi e problemi legati alla censura mancano ancora ricerche articolate sulle case editrici, così come ancora poco numerose sono le testimonianze degli editori che nei ricordi e autobiografie si dilungano su questo aspetto. Avrebbe potuto dirci molto di più Richard Seaver nel suo poderoso volume di memorie, cinquecento pagine, ma gli accenni alla dura censura americana, alla vigilanza della CIA e alla continua ingerenza della politica, dove gli attacchi non si fermarono alle traduzioni ma comprendevano il colore della pelle e la sessualità degli autori, si perdono in una scrittura lineare e poco incisiva che preferisce descrivere anziché indagare⁴³.

⁴⁰ In particolare cfr. C. Feltrinelli, *Senior Service*, Milano, Feltrinelli, 1999.

⁴¹ *Le Dossier de l'Affaire Pasternak. Archives du Comité Central et du Politburo*, préface de J. de Proyard, Paris, Gallimard, 1994; E. Frankel, *Novy mir. A Case Study in the Politics of Literature 1952-1958*, Cambridge, Cambridge University Press, 1981; H. Swayze, *Political Control of Literature in the USSR 1946-1959*, Cambridge (Mass.), Harvard University Press, 1962. Altri titoli in tedesco e soprattutto, molto importanti, in russo, nella bibliografia di Mancosu, *Živago nella tempesta. Le avventure editoriali del capolavoro di Pasternak*, cit., pp. 471-479.

⁴² Con posizioni differenti cfr. M. Alicata, *Sul caso Pasternak*, Roma, Editori Riuniti, 1958; S. D'Angelo, *Il caso Pasternak. Storia della persecuzione di un genio*, Milano, Bietti, 2006. Precisazioni, anche polemiche, sulla posizione tenuta dal PCI e sulla competizione tra Einaudi e Feltrinelli in A. Parysiewicz Lanzafame (ed.), *Pietro A. Zveterevich. L'uomo, lo slavista, l'intellettuale*, Atti del Convegno di studi, Messina 18 aprile 2008, Messina, Dipartimento di Lettere e Filosofia, 2009.

⁴³ R. Seaver, *La dolce luce del crepuscolo. Parigi-New York: l'età dell'oro dell'editoria*, a cura di J. Seaver, introduzione di I. Feltrinelli, Milano, Feltrinelli, 2015.

Über den Rechenunterricht an den Volksschulen in Österreich-Ungarn um das 19. Jahrhundert*

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About the Rechenunterricht at the Volksschulen in Austria-Hungary around the XIXth Century

ABSTRACT: The aim of this article is to give an overview about the mathematics education in primary schools in Hungary and Slovakia (both parts that time of the Habsburg's Empire) at the end of the XVIIIth and in the first part of XIXth century. Besides describing the educational historical circumstances, which give a background to the study of the mathematics teaching at primary level, we give some examples about methods and tasks of this period. With the help of the books of András Lesnyánszky, of Pál Kerekgedei Makó, and of Franc Močnik will be given some insight in the structure and teaching material of the Hungarian elementary mathematics education. Some described motivational approaches of these authors complete the study with proposals for the use of teaching historical facts in the contemporary mathematics teaching.

EET/TEE KEYWORDS: Primary school; Mathematics education in primary level; History of mathematics teaching; Slovakia; Habsburg's Empire; XVIII-XIXth Centuries.

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1. Einführung

Die erste Bildungsanstalt für Volksschullehrer in Europa wurde vom Hl. Johann de la Salle (1651-1719) – im Jahr 1685 im französischen Reims errichtet. Bis zum Anfang der Neuzeit existierten keine spezialisierten Bildungsanstalten für Volksschullehrer innerhalb der heutigen Ungarn¹ und Slowakei². Die Situation begann, sich in der Regierungszeit von Maria Theresia (1740-1780) zu ändern.

Die Schulreform von Maria Theresia basierte auf der Idee des Königs Friedrich II. von Preußen (1712-1786), wonach Menschen durch eigenen Bildungseifer an der Entwicklung des Staates teilnehmen müssten und der Staat die Ausbildung sichern sollte, damit sich die Investitionen ins Bildungswesen rentierten³.

Maria Theresia veröffentlichte das Grunddokument für die Bildungsreform des Ungarischen Königreiches *Ratio Educationis* im Jahr 1777, das noch im Jahr 1806 novelliert wurde. Dieses Dokument bereitete auch die Bedingungen für die institutionelle Lehrerausbildung in den sog. Kursen der Normalschule vor. Im Jahr 1775 wurde die erste Normalschule in Pozsony (heute Bratislava, Slowakei) im damaligen Königreich Österreich-Ungarn eröffnet. Hier lernten die Studenten auch die Methodik der Lehre der Grundschulfächer, und die Absolventen durften die Lehrerstellen in verschiedenen Volksschulen besetzen⁴.

In den ersten Jahrzehnten des 19. Jahrhunderts fehlten aber immer noch spezialisierte Bildungsanstalten für Volksschullehrer. Die Lehrer durften in dieser Zeit nur einen mehrmonatigen Vorbereitungskurs absolvieren. Damals gab es immer noch Lehrer, die Probleme mit dem Lesen und Schreiben hatten, sodass ihr fachliches Niveau niedrig war⁵.

Als Begründer der Ausbildung der Volksschullehrer in Österreich-Ungarn wird der Bischof Jan Ladislav Pyrker (1772-1847) angesehen. Er wurde am 18. August 1818 zum Zipser Bischof ernannt. In diese Diözese (Zips – Szepesség – heute Slowakei)⁶ kam er als der neue Bischof am 12. Mai 1819 ins Amt. Im Laufe

¹ Im Gesetz von 1687 Ungarn verzichtete auf sein Recht von einem freien Königswahl, und Ungarn wurde – obwohl als souveränes Land mit eigenem Gesetzen – untrennbar von den weiteren Teilen des Habsburger Reiches. Die heutige Slowakei war von 12. Jahrhundert bis dem Jahr 1918 ein Teil von Ungarn. Siehe M. Teich, D. Kováč, M. D. Brown, *Slovakia in History*, Cambridge, Cambridge University Press, 2011, pp. 15-37.

² V. Michalická, D. Vaneková, E. Zacharova, *Dejiny najstarsich ucitelskych ustavov na Slovensku-vyskyt skolskych pamiatok*, in *Historia najstarsich ucitelskych ustavov na Slovensku*, Presov, Philosophical faculty of the University of Presov, 2007, pp. 22-55.

³ Die Entwicklung des Mathematikunterrichts kann man finden in: A. Karp, G. Schubring (edd.), *Handbook on the History of Mathematics Education*, New York, Springer, 2014, pp. 241-244.

⁴ B. Bartok, *Az egri romai katolikus erseki tanitokepzo*, in T. Petercsak u. a., *Az egri Domus Universitatis es Liceum. Oktatas, tudomány, művészet, 1763-2013*, Eger, Eszterházy Károly College, 2013, ss. 3-34.

⁵ E. Benkoczy, *Pyrker első magyar tanítóképzője – Az egri erseki r. k tanitokepző centenariumára – Adatok a magyar tanítóképzés történetéhez*, Eger, Az egri erseki liceumi könyvnyomda nyomasa, 1928.

⁶ Siehe auch <<http://www.slovenskyraj.sk/vylety/spkapitula/de.html>> (last access: 04.06.2016).

seines kanonischen Visitierens im Zeitraum von Juli bis August des Jahres 1819 stellte er ein niedriges Lehrerniveau in den Pfarrbezirken und Gemeinden seiner Diözese fest. Aus diesem Grund entschloss er sich, die Lehrerbildungsanstalt im Seminargebäude im Zipser Kapitel (-Szepeshely-, Spisska Kapitula, heute Slowakei) zu errichten, welche er am 2. November 1819 offiziell eröffnete. Der Unterricht fing am 19. November 1819 an. Es war die erste Lehrerbildungsanstalt innerhalb Österreich-Ungarns⁷.

Pyrker war nicht lange im Amt des Zipser Bischofs, denn der österreichische Kaiser Franz I. ernannte ihn zum Patriarch von Venedig im Jahr 1820 und zum Erzbischof von Eger im Jahr 1826. Ähnlich wie in der Diözese Zips und der Erzdiözese Venedig verwirklichte er auch das kanonische Visitieren in der Erzdiözese Eger. Aufgrund dessen entschied er sich, im Jahr 1828 die erste ungarische Bildungsanstalt für Volksschullehrer in Eger zu gründen⁸.

2. Mathematikunterricht in den Volksschulen 1777-1867

Mitte des 18. Jahrhunderts gab es in Ungarn schon praktisch überall Schulen zur Grundbildung. Die Regelung für solche Schulen wurde von Ignaz Felbiger (1725-1788) ausgearbeitet, *Allgemeine Schulordnung für die deutschen Normal-Haupt- und Trivialschulen in in sämtlichen kaiserlich und königlichen Erbländern* (1774). Felbiger hat sogar ein Handbuch für die Grundschullehrer geschrieben (*Methodenbuch für Lehrer der deutschen Schulen* 1776) und bei der Publikation von Lehrbüchern mitgewirkt⁹.

Nach der Regelung der I. Ratio Educationis (1777), durch die nur die katholischen Schulen geregelt wurden, da die protestantischen diese aufgrund ihres Rechts auf Selbstbestimmung abgelehnt haben, wurden *drei Typen von Volksschulen* in Ungarn eingeführt¹⁰:

- a. *Normalschulen* (vorrangige Volksschulen). Sie wurden nur in größeren Städten eröffnet und galten gleichzeitig als Schulen zur Ausbildung der Grundschullehrer. Die ersten solchen Schulen wurden 1771 in Wien und 1775 in Pozsony (heute Bratislava) eröffnet. Nach der Regelung der I. Ratio sollte es in allen Bildungsbezirken eine Normalschule geben. In diesen Schulen unterrichteten im ganzen Jahr drei Lehrer in drei Jahrgängen.
- b. In den *Kleinstadtschulen* unterrichteten in zwei Räumen – im Herbst und

⁷ J. Guncaga, *Teachers Institute in Spisska Kapitula. The first teachers institute in the area of Slovakia*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 409-429.

⁸ J.L. Pyrker, *Mein Leben 1772-1847*, Wien, Aladar Paul Czigler, 1966.

⁹ B. Pukánszky, A. Németh, *Neveléstörténet*, Nemzeti Tankönyvkiadó Rt, 1996.

¹⁰ Á. Kiss, *A magyar népiskolai tanítás története. Franklin társulat*, Budapest, 1881 und auch G. Köves, *Alapozó szintű matematika tankönyvek vizsgálata a kezdetektől napjainkig*, PhD értekezés, Pécs, 2012.

Winter und in den frühen Frühlingsmonaten – nur zwei Lehrer.

c. In den *Volksschulen in den Dörfern* arbeitete ein Lehrer und unterrichtete nur im Winter, da sonst die Schüler auf den Feldern arbeiten mussten. In den anderen Jahreszeiten wurde nur sonntags unterrichtet und dann gab es nur eine Wiederholung des schon im Winter gelernten Materials.

Es gab drei Gruppen von Lehrmaterialien:

- Hauptfächer – für alle obligatorisch und notwendig
- Nebenfächer – für alle obligatorisch und nützlich
- Außerordentliche Fächer – nicht notwendig und nur für einige Schüler nützlich

Der Rechenunterricht war obligatorisch, aber der Geometrieunterricht nicht einmal in den städtischen Schulen vorgeschrieben.

Das Ziel der Übungsaufgaben des Rechenunterrichts war die Anwendung der Kenntnisse in den Alltagssituationen, so kamen die Themen dazu in den Dörfern eher aus der Landwirtschaft, in den kleineren Städten besonders aus dem Haushaltswesen und aus den örtlichen Handwerksbetrieben, in den größeren Städten meistens aus dem Handel und Handwerksbetrieben¹¹.

Die II. Ratio hat ebenfalls drei Typen von Volksschulen bestimmt und eine Schulpflicht für Kinder im Alter von 6-12 Jahren vorgeschrieben, die I. Ratio Educationis hat keine ausgesprochene Schulpflicht vorgeschrieben¹². Der Rechenunterricht begann in der ersten Klasse, und auch das Lehrmaterial war für die einzelnen Klassen bestimmt. In der ersten Klasse die Elemente für das Rechnen, in der zweiten Klasse die vier Arten des Rechnens mit Ganzzahlen und Bruchzahlen, in der dritten Klasse Proportionen, Maße und Geldeinheiten, und in der vierten Klasse (diese dauerte zwei Jahren) Proportionen, Verhältnisse, Zinsrechnung und danach Rechnungen im Handel und Geschäft wurden unterrichtet.

In dieser Zeit wurden die protestantische Bestrebungen bezüglich der Bildung im Buch von Lajos János Schedius (1768-1847) zusammengefasst, das 1806 unter dem Titel *Systema rei scholasticae evangelicorum Aug. conf. In Hungaria* erschien¹³.

Die Vorschriften der *Magyarország elemi tanodai szabályai* [Regel für grundbildende Schulen in Ungarn] (1845) waren bis 1868 gültig (in Kraft). Die Schulpflicht dauerte wie vorher von 6-12 Jahren und es gab weiterhin eine Unterscheidung zwischen grundbildenden Unter- und Hauptschulen.

¹¹ E. Fináczy, *A magyarországi közoktatás története Mária Terézia korában*, Budapest, Magyar Tudományos Akadémia, 1902.

¹² M. Kazuska, *A tankötelezettség múltja, jelene és jövője*, «Miskolci Jogi Szemle», vol. 7, n. 1, 2012.

¹³ E. Barkó (ed.), *Az ágostai hitvallású evangélikusok iskolaügyének rendszere Magyarországon*, Budapest, OPKM, 1992.

3. Pál Kerekgedei Makó (1724-1793) – sein Leben und seine Unterrichtstätigkeit

Kerekgedei Makó Pál (Pál Makó von Kerekgede) wurde am 18. Juli 1724 in einer alten adeligen Familie in Jászapáti (Ungarn) geboren. Er lernte in der Volksschule von Jászapáti und danach in der sechsklassigen Mittelschule der Jesuiten in Eger. Der begabte junge Mann schloss sich dem Jesuitenorden an und begann eine lange und gründliche Ausbildung, die als Basis seines breiten Allgemeinwissens diente. Die letzten drei Jahre der sog. philosophischen Schule hat Makó schon an der Universität Nagyszombat (Trnava, heute Slowakei) abgelegt, die von Jesuiten geleitet wurde¹⁴.

Im Schuljahr 1747-1748 arbeitete er schon in der Mittelschule Ungvár (Ukraine) als Lehrer der dritten (grammatischen) und der vierten (syntaxis) Klasse. Dann verbrachte er zwei Jahre als mathematischer «Repetent» in Wien – was eigentlich die Lehrerausbildung bedeutete. Ein Jahr war er noch als Mittelschullehrer in Trnava tätig, dann studierte er 4 Jahre lang Theologie an der Universität Graz. Mit 31 Jahren wurde er zum Priester geweiht.

Dank seines breiten Allgemeinwissens und umfassender Kenntnisse wurde Makó von Gerard van Swieten – Arzt und Berater der Kaiserin Maria Theresia – als Professor im Theresianum in Wien empfohlen. 1763 wurde Makó Lehrer für Mathematik, Experimentalphysik und Mechanik in dieser akademischen Schule. Er unterrichtete die beiden ersten Disziplinen auf Latein, Mechanik jedoch auf Deutsch.

Während der zehn Jahre, die Makó im Theresianum verbracht hat, hat er sich viel mit Mathematik, Physik und Philosophie beschäftigt und in seinen freien Stunden sogar Gedichte auf Lateinisch geschrieben. In diesen Jahren entstanden seine mathematischen Bücher: *Compendiaria matheseos institutio*“ (1764), *Calculi differentialis et integralis institutio* (1768) und *De arithmetis et geometricis aequationum resolutinibus libri duo* (1770).

Ab 1773 widmete Makó viel Zeit den Organisationsfragen der ungarischen öffentlichen Bildung; mit József Ürményi (1741–1825) und Dániel Tersztyánszky (1730-1800) war er an der Ausarbeitung der neuen Landesregelung zur Bildung beteiligt. Makó hat den mathematischen Teil ausgearbeitet. Als Endergebnis erschien im 1777 die *Ratio Educationis*, die auf einer einheitlichen Grundlage die öffentliche Bildung von der Volksschule bis zu der Universität in Ungarn regelte. 1777 hat Maria Theresia die Universität Nagyszombat (1635 gegründet) nach Buda (Budapest, Ungarn) verlegt und Makó wurde zum Direktor der Geisteswissenschaftlichen Fakultät ernannt. Er blieb auf diesem Posten bis zu seinem Tod.

Die *Ratio* hat das ungarische Schulsystem grundsätzlich verändert, und für den neuen Lehrplan waren auch neue Lehrbücher nötig. Die mathematischen

¹⁴ P. Sárközy, *Kerekgedei Makó Pál élete és matematikai működése*, <http://mek.oszk.hu/05400/05407/pdf/Sarkozy_Mat_Mako.pdf> (last access: 06.05.2016).

Lehrbücher hat Makó geschrieben, seine Bücher für die Mittelschulen sind ohne Angabe des Autors erschienen, darunter bereits im Jahr 1777 die *Institutiones Arithmeticae* als Zusammenfassung der grundlegenden Kenntnisse über Arithmetik, in Buda in der Druckerei der Universität. Es gab mehrere Ausgaben dieses Lehrbuches, 64 Jahre nach der ersten Ausgabe erschien die letzte Ausgabe.

Die weiteren zwei mathematischen Lehrbücher für Mittelschulen von Makó waren die *Eeementa Matheseas Purae* (praktisch mit dem Inhalt der *Compendiaria Matheseos Institutio*) 1778 (insgesamt 6 Ausgaben) und die *Elementa Geometricae Practicae* aus demselben Jahr (insgesamt 4 Ausgaben), diese erschienen auch in Buda. Makós Bücher waren korrekt geschrieben¹⁵, aber auf Lateinisch, deswegen waren sie für die Schüler nicht leicht zu lesen. Die Schüler haben oft eigene Notizen gemacht. Diese Notizen wurden sogar oft vervielfältigt und meistens wurde aus diesen handgeschriebenen Schriften gelernt. Die offizielle Sprache des Unterrichtes in den ungarischen Mittelschulen war bis 1947, abgesehen von einer kurzen Periode Lateinisch¹⁶.

Makó hat nicht nur für die höheren Klassen Lehrbücher verfasst, sondern auch für die Grundschulklassen ein «Rechenbuch» geschrieben, das wieder ohne den Namen des Autors erschien. Er hat, wie zum Beispiel später bei den Reformen des ungarischen Mathematikunterrichtes in den Mittelschulen Manó (Emanuel) Beke (1862-1946), über die mathematische Bildung in einem «übergreifenden Bogen ab der Grundschule» nachgedacht.

4. Das Rechenbuch von Pál Kerekgedei Makó

Das Lehrbuch über Arithmetik *Institutiones Arithmeticae* wurden für Volksschulen überarbeitet und erschienen in verschiedenen Sprachen in den Ländern des österreichischen-ungarischen Königreichs, darunter auch auf Ungarisch *Bevezetés a számvetésre a magyar és hozzá tartozandó tartományok nemzeti iskolái számára* [Anleitung zum Rechnen, zum Gebrauche der Nationalschulen in dem Königreiche Ungarn und den damit verbundenen Staaten (1780)] und auf Deutsch (Pic. 1).

Das Buch beinhaltete das ganze Lehrmaterial in Arithmetik für Volksschulen und bis 1840 es wurde mehrmals in mehreren Sprachen beispielsweise auch auf ungarisch, tschechisch und kroatisch ausgegeben¹⁷.

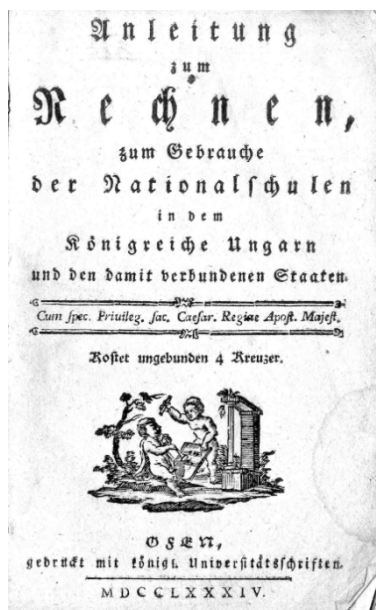
Nach einer Einführung in die Welt der Zahlen folgten vier Kapitel und ein Anhang¹⁸.

¹⁵ B. Szénássy, *A magyarországi matematika története*, Budapest, Akadémiai K., 1970.

¹⁶ I. Mészáros, *A magyar nevelés története 1790-1849*, Budapest Tankönyvkiadó, 1968.

¹⁷ L. Wirth, *Kétszázötven éves a newtoni fizika hazánkban, Kerekgedei Makó Pál pályaképe*, «Fizikai Szemle», nn. 7-8, 2013, pp. 237.

¹⁸ P. Kerekgedei Makó, *Anleitung zum Rechnen*, 1784.



Pic. 1 *Rechenbuch* P. Makó von 1784. (Országos Széchenyi Könyvtár, Budapest)

Das Einmaleins.

| | |
|-----------------|---------------------|
| 1 mal 1 ist 1 | 5 mal 5 ist 25 |
| 2 mal 2 ist 4 | 5 mal 6 ist 30 |
| 2 mal 3 ist 6 | 5 mal 7 ist 35 |
| 2 mal 4 ist 8 | 5 mal 8 ist 40 |
| 2 mal 5 ist 10 | 5 mal 9 ist 45 |
| 2 mal 6 ist 12 | 5 mal 10 ist 50 |
| 2 mal 7 ist 14 | |
| 2 mal 8 ist 16 | 6 mal 6 ist 36 |
| 2 mal 9 ist 18 | 6 mal 7 ist 42 |
| 2 mal 10 ist 20 | 6 mal 8 ist 48 |
| | 6 mal 9 ist 54 |
| | 6 mal 10 ist 60 |
| 3 mal 3 ist 9 | |
| 3 mal 4 ist 12 | 7 mal 7 ist 49 |
| 3 mal 5 ist 15 | 7 mal 8 ist 56 |
| 3 mal 6 ist 18 | 7 mal 9 ist 63 |
| 3 mal 7 ist 21 | 7 mal 10 ist 70 |
| 3 mal 8 ist 24 | |
| 3 mal 9 ist 27 | 8 mal 8 ist 64 |
| 3 mal 10 ist 30 | 8 mal 9 ist 72 |
| | 8 mal 10 ist 80 |
| 4 mal 4 ist 16 | |
| 4 mal 5 ist 20 | 9 mal 9 ist 81 |
| 4 mal 6 ist 24 | 9 mal 10 ist 90 |
| 4 mal 7 ist 28 | |
| 4 mal 8 ist 32 | 10 mal 10 ist 100 |
| 4 mal 9 ist 36 | |
| 4 mal 10 ist 40 | 10 mal 100 ist 1000 |

Pic. 2 *Das Einmaleins* auf der letzten Seite des *Rechenbuchs*.

1. Von den vier Rechnungsarten in ungenannten Zahlen.
2. Von den genannten Zahlen.
3. Von den Brüchen.
4. Von der Regel Detri.
 - Anwendung der Regel Detri auf den Zins und andere in gemeinen Leben vorkommende Rechnungen.
 - Von Auflösung der „zusammengesetzten“ Regel Detri in die einfache Anhang: Von der Gesellschaftsrechnung, Das Einmaleins (Tabelle).

Das Lehrmaterial wird, wie es noch in dieser Zeit bei den Lehrbüchern¹⁹ üblich war, einerseits anhand Definitionen mit Hilfe von einigen Beispielen erarbeitet, die sich nicht auf die abstrakten Zusammenhänge, sondern eher auf Anwendungsmöglichkeiten konzentrierten. Zum Beispiel werden die folgenden Fälle behandelt, wo von einer kleineren Ziffer eine größere abgezogen werden sollte: 5341-1779, 402-241, 9000-5934²⁰ Andererseits gibt es in dem Buch keine Aufgaben zum Üben der erworbenen Kenntnisse.

¹⁹ B.Gy. Maróthi, *Arithmetica*, Debrecen, 1743. Aber hier wird auch bemerkt, dass es wichtig ist, die Beispiele, die nach Schwierigkeitsgrad geordnet sind, selbst zu lösen.

²⁰ Kerekgedei Makó, *Anleitung zum Rechnen*, cit., p. 12.

Es werden dem Schüler eher Verfahren vermittelt aber immer mit Erklärung. Die Definitionen werden klar angegeben, sind noch heute verständlich. Es war abgesehen von einigen Schwierigkeiten die den damaligen Fachwörtern (z.B. genannte und ungenannte Zahlen) zu verdanken sind. Die Fachsprachen-Problematik gilt besonders bei der ungarischen Ausgabe, da um diese Zeit die mathematische Fachsprache noch nicht angemessen entwickelt war²¹.

Interessant ist am Anhang, an der Tabelle des Einmaleins (siehe Pic. 2), dass dieses nicht auf ein automatisches Rechenverfahren verweist, sondern schon die Kommutativität der Multiplikation aufgebaut wurde: Es werden die Multiplikationen, die von den vorigen nur in der Reihenfolge der Zahlen verschieden sind, nicht wiederholt.

Das Rechenbuch ist gemäß der Grundauffassung des passiven Lernens verfasst, wo der Lehrer das Material «abgibt» und dieses von dem Schüler aufgenommen wird. Etwas vereinfacht²²:

Der Lernende setzt nur seine Sinne ein, öffnet sozusagen Augen und Ohren, und versucht nachzuahmen was ihm vorgemacht wird, bleibt aber ansonsten passiv.

Es gibt keine Abbildungen und die Definitionen sind nicht wirklich für Lernende in dem Alter von 6-12 Jahren formuliert. In seiner Form ist das Rechenbuch eher als Lehrer-Hilfsbuch geeignet.

5. Mathematiklehre im Buch *Methodik und Didaktik von Lesnyánszky András*

Das Unterrichten der Mathematik in den Volksschulen des Königreiches Österreich-Ungarn beeinflusste das Lehrbuch *Didaktika és Methodika* [Didaktik und Methodik] geschrieben auf Ungarisch von Lesnyánszky András (1795-1859). Es wurde im Jahr 1832 in der Stadt Nagyvárad (heute: Oradea, Rumänien) veröffentlicht. Sein Autor war Lesnyánszky, der römisch-katholische Priester und Lehrer in der Normalschule in Oradea. Man vermutet, dass die Inspiration für dieses Werk das Buch *Didaktik und Methodik* (geschrieben auf Deutsch) von Joseph Weinkopf (1787-1873) war²³. Er wirkte als Diözesanpriester und wurde im Jahre 1811 ordiniert. Er war in der Periode 1819-1832 als Katechet an der

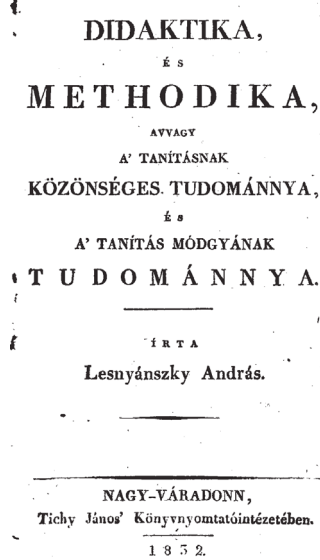
²¹ B. Szénássy, *A magyarországi matematika története*, Budapest, Akadémiai K., 1970, pp. 202-206 – diese Problematik blieb noch lange bis etwa Ende des 19. Jahrhunderts bestehen.

²² E.Ch. Wittmann, *Grundfragen des Mathematikunterrichts*, Vieweg, Verlag, 1981; G. Malle, *Didaktische Probleme der elementaren Algebra*, Vieweg, Verlag, 1993.

²³ B. Pukanszky, *Két tanítói kézikönyv a múlt század els felebl*, in www.pukanszkybela.hu (last access: 06.01.2016).



Pic 3: Titelseite des Lehrbuchs *Didaktik und Methodik* von Joseph Weinkopf



Pic 4: Titelseite des Lehrbuchs *Didaktika és Methodika* [Didaktik und Methodik] von Lesnyánszky András.

Normalhauptschule St. Anna tätig und er war auch Professor der Katechetik und Pädagogik an der Universität Wien²⁴.

Das Lehrbuch *Didaktik und Methodik* von Weinkopf hat zwei Hauptteile:

1. Allgemeine Unterrichtslehre oder Didaktik.
2. Methodik.

Im ersten Hauptteil widmet sich der Autor den folgenden Gebieten (in Klammern sind Unterkapitel angegeben):

- Über den Grundsätzen der Auswahl und Ordnung (Über Lehrstoffe, Über dem Lehrplanen).
- Über den verschiedenen Unterrichtsmethoden und den allgemeinen Eigenschaften eines zweckmäßigen Unterrichtes (Über den verschiedenen Unterrichtsmethoden und ihrer Anwendbarkeit, Über den allgemeinen Eigenschaften eines zweckmäßigen Unterrichtes, Über den Prüfungen).

Dieser Teil war auf allgemeine didaktische Prinzipien der Lehrerarbeit in Trivial- und Normalschule ausgerichtet. Im zweiten Teil behandelt der Autor die Methodik (Fachdidaktik) der einzelnen Fächer in den angeführten Schulen:

²⁴ M. Macko, *Der erste Redemptorist aus dem alten Ungarn: Johannes Kuban 1797-1866*, «Spicilegium historicum Congregationis Ssmi Redemptoris», vol. 59, n. 2, 2011, pp. 415-428.

- Über der Lehre beim Unterricht in Buchstabenkenntnis, Buchstabieren, Syllabieren und Lesen.
- Über dem Unterricht im Schönschreiben.
- Über dem Verfahren beim Unterricht im Rechnen.
- Zweckmäßiges Verfahren beim Unterricht in der deutschen Sprachlehre und im Rechtschreiben.
- Über der Einleitung zu schriftlichen Aufsätzen²⁵.

Während das Lehrbuch von Weinkopf für die Priester mit pädagogischer Ausbildung bestimmt war, wurde das Lehrbuch von Lesnyánszky András für Volksschul-Lehrer ohne Qualifikation und pädagogische Ausbildung geschrieben. Aus dem genannten Grund ist sein Inhalt ausführlicher und die einzelnen Themen werden näher erklärt, da es im Lehrbuch von Lesnyánszky András konkrete Klassensituationen und Modelle für die Lehrer gibt. Diese Situationen umfassen auch konkrete Fragen und Aktivitäten, die von den Lehrern für die Schüler vorbereitet werden können.

Der erste Teil des Lehrbuchs von Lesnyánszky wurde den allgemeinen Prinzipien des Lehrens gewidmet, wo vor allem Ziele, die Auswahl der Unterrichtsfächer, Unterrichtsziele, Prüfungsformen und die Bewertung der Schüler vermittelt werden. Im zweiten Abschnitt wurden einzelne Unterrichtsfächer in damaligen Volks-/ Normaschulen (heute Grundschulen) beschrieben. Er beinhaltet folgende Grundkapitel:

- a. Über Lehren des Lesens.
- b. Über Lehren der Schönschrift.
- c. Über Lehren des Rechnens.
- d. Über Lehren der ungarischen Sprachkunde und Rechtschreibung.

Im dritten Kapitel schreibt der Autor vor allem über Arithmetik für Volksschulen. Zuerst kam es zur Einführung des dekadischen Zahlensystems und zu den Operationen mit natürlichen Zahlen: Addition, Subtraktion, Multiplikation, Dividieren.

Weiter in diesem Kapitel wurde die Lehre von gebrochenen Zahlen und deren Operationen und auch die praktischen Aufgaben mit dem Dreisatz erörtert. In der Lehre des Rechnens wurden folgende Grundsätze zur Beachtung empfohlen:

1. In der Rechenlehre ist es wichtig, von Einfachem zu Komplizierterem und von Leichtem zu Schwierigerem vorzugehen. Nie soll man zu einer anderen Art des Rechnens weiterleiten, bevor die Kinder die Grundprinzipien der gegebenen Rechentechnik im Unterricht vollkommen beherrschen.
2. Die Rechenlehre soll nicht nur auf das Gedächtnis orientiert werden, sondern soll auch die Vernunft aktivieren. Es ist notwendig, den Unterricht so zu präsentieren, dass die Schüler das Gelernte auch verstehen. Es ist fehlerhaft, die Kinder mit dem Erlernen unverständlicher, abstrakter

²⁵ J. Weinkopf, *Methodik und Didaktik*, Wien, Johannes Baptist Wallishausser, 1822.

Regeln zu quälen. Kinder verstehen sie nicht, werden oft verwirrt, vergessen sie schnell und der Unterricht wird ihnen lästig.

3. Das Rechnen soll nicht bloß als mechanische Operation, sondern als verstandene Operation unterrichtet werden. Ein solcher Unterricht wäre unangenehm, unpraktisch und «schwankend» in der Anwendung, es häufen sich die Regeln, die leicht vergessen oder verwechselt werden.
4. Der Unterricht im Rechnen soll weitgehend angenehm und interessant sein. Der Lehrer soll ferner nicht bloß trockene und abstrakte Definitionen geben, sondern die Regeln und Definitionen auf die bekannte Weise selbst finden lassen. Der Unterricht wird zugleich angenehm, weil das Selbstgefundene mehr Reiz hat. Der Lehrer soll keine leeren Zifferrechnungen geben, sondern Beispiele aus der Tätigkeit und dem Leben der Kinder und Eltern.

In diesen Grundsätzen erscheinen einerseits einige Züge eines Lernprozesses des nach der Stufentheorie, zum Beispiel sind einige Gedanken aus der Lernstufentheorie von Aebli²⁶ identifizierbar. Nach Aebli muss der Lernprozess folgende Stufen durchlaufen:

- das problemlösende Aufbauen einer Struktur;
- das Durcharbeiten derselben;
- das Üben und Wiederholen zum Zwecke ihrer Konsolidierung;
- das Anwenden in neuen Problemsituationen.

In den Grundsätzen erscheinen das problemlösende Aufbauen einer Struktur und das Üben und Wiederholen zum Zwecke ihrer Konsolidierung etwa bei Punkt 2., 3, und schließlich das Anwenden in neuen Problemsituationen, etwa bei Punkt 4.

Andererseits erscheint zum Beispiel auch der Gedanke des entdeckendes Lernens²⁷ bei Punkt 4.

Die oben genannten Lehrbücher benutzen Modelle für Erklärungen der mathematischen Begriffe. Diese Modelle befinden sich unter anderem in der Theorie des Erkenntnisprozesses nach Hejny²⁸:

1. Motivation: Diese Einleitungsphase ist sehr wichtig, weil Sie «Motor» des Erkenntnisprozesses ist. Der Schüler ist fähig, ein Problem, das für ihn interessant ist, leichter zu lösen. Deshalb entsteht bei Schüler/innen der Wunsch nach Erkenntnis und Erfahrung in bestimmten Lernbereichen²⁹.
2. Die Schaffung «separierter Modelle»: Der Schüler löst ein Problem durch verschiedene «separierte Modelle». Dank dieser erwirbt er neue Erfahrungen. Zuerst sieht er keine Zusammenhänge zwischen diesen Erfah-

²⁶ H. Aebli, *Zwölf Grundformen des Lehrens*, Klett Cotta, 1994, p. 24.

²⁷ H. Winter, *Entdeckendes Lernen*, Vieweg, Verlag, 1991.

²⁸ M. Hejny und a., *Teoria vyučovania matematiky 2*, Bratislava, SPN, 1989.

²⁹ T. Jablonsky, *Cooperative learning – an alternative form of education*, «Problemy wczesnej edukacji», n. 2, 2008, pp. 53-60.

rungen. Bei der Arbeit mit den Modellen erreicht er durch Strukturierung und Klassifikation der Erfahrungen ein Universalmodell. Dieses Modell kann die separierten Modelle umfassen.

3. Das «Universalmodell»: Dieses Modell zeigt die wichtigsten Eigenschaften der separierten Modelle und umfasst sie. Durch die Arbeit mit diesen kann der Schüler neue Erkenntnisse entdecken. Dieser Übergang im Bewusstsein des Schülers, im Moment der Entdeckung der Erkenntnis, wird Abstraktionshebung genannt.
4. Entstehung von Kenntnissen: Neue Erkenntnisse, Begriffe, Beziehungen oder Abhängigkeiten zwischen Phänomenen werden abstrahiert. Der Schüler bestätigt die Richtigkeit der neuen Erkenntnisse an den früheren separierten und Universalmodellen.
5. Kristallisierung: Während dieser Etappe bringt der Schüler die neuen Erkenntnisse in eine Erkenntnisstruktur. Außerdem weitert er die Möglichkeiten zu neuen Erkenntnissen aus. Dazu löst er verschiedene Probleme, die mit diesen neuen Erkenntnissen zusammenhängen.
6. Automatisierung: Der Schüler benutzt automatisch seine neuen Kenntnisse bei der Lösung verschiedener Aufgaben und Probleme. In dieser Etappe braucht er keine Modelle mehr aus den vorangehenden Phasen.

Dieser Mechanismus geht aus dem Schema Motivation – Erfahrungen – Erkenntnis hervor. Im Unterricht zum Thema „Folgen und Reihen“ wird dieser Mechanismus oft nicht beachtet. Deshalb existiert bei den Schülern ein starker Formalismus, ihre Kreativität wird daher weniger entwickelt³⁰.

Die Stufen folgen nicht streng nacheinander in einem konkreten Erkenntnisprozess. Ein Schüler auf der dritten Stufe kann auf die zweite Stufe zurückkommen, wenn er ein neues Modell findet oder, wenn er ein (bereits vorhandenes) Modell für eine neue Erkenntnis braucht.

Im Lehrbuch von Lesnyánszky András sind solche separierten und universellen Modelle vorhanden, die in der Umgebung der Kinder oder der Arbeit der Eltern vorkommen. Zum Beispiel wird laut Paragraph 43 *Vernunftwahrnehmungen von Zahlen von 1 bis 10* das Modell Bohnensamen empfohlen:

Wir nehmen einen Bohnensamen in die Hände und fragen einen Schüler, wie viele Samen wir in den Händen haben. Danach nehmen wir noch einen aus dem Körbchen dazu. Gleich so soll sich auch ein Schüler einen Samen nehmen. Wir fragen den Schüler: Wie viel Bohnensamen hast du aus dem Körbchen genommen? Nach der richtigen Antwort sagen wir, dass 1 Bohne und noch 1 Bohne gleich 2 Bohnen sind. Anhand dessen fragen wir den Schüler, wie viel Samen wir in der Hand halten. Wie viel Samen hat der Schüler in der Hand, wenn er sich einen aus dem Körbchen genommen hat? Weiter sagt der Lehrer: Also ich habe mehr als du, und wieder fragt den Schüler, wer mehr Bohnensamen hat. Und was soll er tun, um auch 2 Bohnensamen zu haben?³¹

³⁰ Hejny und a., *Teoria vyučovania matematiky 2*, cit.

³¹ A. Lesnyánszky, *Didaktika es Methodika*, Oradea, Tichy Janos Konyvnyomtatointezet,

6. *Leben und Tätigkeit von Franc Močnik (1814-1892)*

Im Jahr 2014 erinnerten wir uns an den 200. Geburtstag von Dr. Franz Močnik, des Verfassers von zahlreichen und bekannten Mathematiklehrbüchern der zweiten Hälfte des 19. Jahrhunderts.

Franz von Močnik wurde am 1. Oktober 1814 in Cerkno in Slowenien als Sohn slowenischer Eltern, des Bauers und Gastwirts Andrej von Močnik und seiner Ehefrau Marjana, geboren³². Er besuchte die Volksschule in Idrija. Nachdem er das Gymnasium und philosophische Studien in Ljubljana absolviert hatte, wandte er sich der theologischen Fakultät in Gorica (jetzt slowenisch-italienische Grenze) zu, die er absolvierte, ohne jedoch in den geistlichen Stand einzutreten. Im Jahre 1837 nahm er die Stellung eines Lehrers in Gorica an³³.

Während dieser Lehrtätigkeit verfasste Močnik die wissenschaftliche Abhandlung *Theorie der numerischen Gleichungen mit einer Unbekannten*, angeregt durch Augustin Louis Cauchy (1787-1857), den er schon etwas früher kennengelernt hatte³⁴. Cauchy stellte die approximativen Lösungen von Gleichungen aus einem allgemeineren Standpunkt vor. Močnik wollte Cauchys Methode in deutscher Sprache in einer leichter zugänglichen Interpretation und Erklärung darstellen.

Močnik wurde im Jahre 1840 zum Doktor der Philosophie in Graz promoviert. Im Jahre 1846 wurde er zum Professor der Elementar-Mathematik an der technischen Akademie in Lvov (jetzt Ukraine) ernannt. Er war in den Jahren 1851 Professor für Mathematik an der Universität in Olomouc (jetzt Tschechische Republik). Er versah später bis zum Jahre 1860 die Stellung des Volksschulinspektors in Ljubljana. Im Jahre 1861 wurde ihm die Inspektion der Volks- und Realschulen in der Steiermark und in Kärnten in Graz anvertraut. Er wurde im Jahre 1869 zum Landesschulinspektor erster Klasse für die Steiermark ernannt. Im Jahre 1871 ging er aus gesundheitlichen Gründen in den Ruhestand. Er verbrachte seinen Lebensabend in Graz und er war mit literarischen Arbeiten aktiv bis zum seinem Tod am 30. November 1892.

Seine Publikationstätigkeit im Rahmen der Gestaltung der Mathematiklehrbücher war sehr reich. Wie Branko Sustar³⁵ ausführt, hat die letzte Bibliographie von Močnik Jose Povsic³⁶ zusammengestellt. Seine Lehrbücher wurden im Original auf Deutsch publiziert (148 Bücher in 980

1832, Übersetzer: Ján Gunčaga.

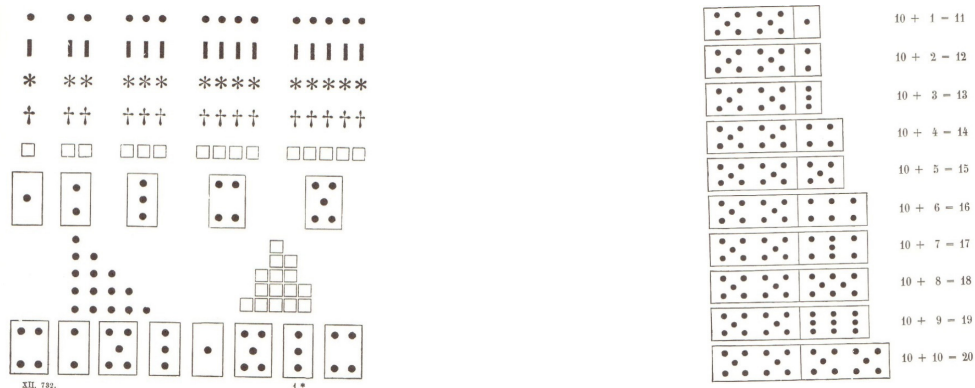
³² J. Povsic, *Bibliographie von Franc Močnik*, Ljubljana, Academia Scientiarum et Artium Slovenica, 1966.

³³ F. Trisch, *Biographien österreichischer Schulmänner*, Wien, Verlag von A. Pichlers Witwe & Sohn, 1897.

³⁴ Povsic, *Bibliographie von Franc Močnik*, cit.

³⁵ B. Sustar, *Pogledi na Močnikove matematične učbenike v prevodih na številne jezike*, in *Zvrtilino in Delom*, Ljubljana, Narodna in univerzitetna knjižnica, pp. 41-51.

³⁶ V. Copic, *Pouk matematike v obvezni osnovni soli*, in *Osnovna sola na Slovenskem*, Ljubljana, 1970, p. 520.



Pic. 7. Modelle für natürliche Zahlen in dem Rechenbuch *Računica* von Franz Močnik. F. Močnik, *Računica za obče ljudske šole. Prva stopnja*, Na Dunaji, zaloga šolskih knjig, 1915.

In diesem Beitrag wurden also wichtige Jahrzehnten der Geschichte des Grundschulunterrichtes in Mitteleuropa betrachtet, die weniger bekannt sind³⁷.

Die erwähnten Persönlichkeiten haben zur Bildung der Lehrkräfte und zur Erhöhung des Niveaus des Unterrichtes im Gebiet der Mathematik beträchtlich beigetragen. Sie haben theoretisch rechenfertigmachende praktische Vorschläge formuliert und damit die Grundlage für eine wissenschaftliche-didaktische Betrachtung des elementaren mathematischen Unterrichtes errichtet. Lehrbücher und Methodenbücher bedeuteten ein wichtiges Hilfsmaterial nicht nur für qualifizierte, sondern auch noch mehr für unqualifizierte Grundschullehrer.

Die Werte der Methoden die hier zitiert wurden können nur unter den relevanten Zeiten wirklich beurteilt werden, die geschichtliche Rahmen, die kurz skizziert wurden geben darüber einige Informationen. Auch die Themen der Bücher sind verschieden. Das Rechenbuch von Kerekgedei Makó wurde für direkten Gebrauch in der Schule geschrieben, dagegen die Bücher von Lesnyánszky und Močnik sind über didaktischen Fragen geschrieben und waren für die Lehrpersonen gemeint. Die Wichtigkeit des Themas im Buch von Močnik zeigt, dass das *Kopfrechnen* auch heute wichtige Methode in dem arithmetischen Unterricht der Primarstufe ist. Diese Methode neben der Schulung in dem Rechnen kann beispielsweise zur Förderung der Kreativität auch beitragen³⁸.

Die didaktischen und methodischen Prinzipien und Zugänge der erwähnten Bücher haben für heutige Lehramtsstudenten und Lehrer in den Grundschulen

³⁷ vgl. beispielsweise F. Karp, G. Schubring, *Handbook on the History of Mathematics Education*, New York, Springer, 2014, pp. 141-143, 580-581.

³⁸ vgl. u.a. G. Mittrig, *Was geht uns vor wenn wir rechnen?*, Marburg, Tectum Verlag, 2001.

von großen Wert, weil sie auch einige geschichtliche Fakten betreuen, die den Weg zeigen der zum verstehen-orientierten Mathematikunterricht führte. Eine Motivation für die weitere Forschung liegt beispielsweise in der Suche nach den Verwendungsmöglichkeiten des didaktischen Inhaltes dieser Lehrbücher für den Mathematikunterricht in der heutigen Grundschule³⁹.

Die Nutzung von historischen Erfahrungen aus der Geschichte des mathematischen Unterrichtes ist von Bedeutung auch im heutigen Unterricht, da diese nicht nur motivierend sind sondern mit einfachen Beispiele sogar zum Verstehen mathematischer Inhalten beibringen können. und für Lernenden als Anlass dienen zur weiteren Forschungen im schulischen Rahmen.

Dabei können auch die Mittel der Informations- und Kommunikationstechnologien genutzt werden⁴⁰.

Heutige Digitalisierung der historischen Materialien in den wissenschaftlichen Sammlungen, Archiven und Museen unterstützt die inhaltliche und didaktische Forschung der historischen Lehrbücher. Diese Forschung zur Geschichte der Pädagogik und des Mathematikunterrichts des damaligen Österreich-Ungarn zeigt die mögliche Rolle Mitteleuropas in Hinsicht auf seine Kultur- und Schultraditionen und unterstützt auch ihre Europäische Identität⁴¹.

³⁹ E. Herendiné Kónya, M. Tarcsi, *Preparation for and teaching of the concept of area*, in B. Maj, E. Swoboda, K. Tatsis, (edd.), *Motivation via Natural Differentiation in Mathematics*, Rzeszow, Wydawnictwo Uniwersytetu Rzeszowskiego, 2010, ss. 141-151.

⁴⁰ I. Krech, *On rotations of geometrical figures*, in *Obzory matematiky, fiziky a informatiky*, Nitra, PROTONIT, 2014, ss. 21-24.

⁴¹ Siehe <<https://www.ffg.at/europa/h2020/gesellschaft>> (last access: 01.04.2016).

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Cronache scientifiche
e Attività
degli istituti di ricerca

Il contributo di Anna Maria Bernardinis (1932-2017) alla pedagogia della letteratura per l'infanzia

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Anna Maria Bernardinis (1932-2017) and her pedagogical approach to children's literature

ABSTRACT: This paper reconstructs the research path of Anna Maria Bernardinis (1932-2017) in the field of children's literature. Since the 1960s, and for the following 50 years, she developed an original position on the basis of the personalistic theory on education. She also was a real pioneer in many fields: she created a research group on children's literature at the University of Padova, as well as innovative reader-centred libraries which foster children's engagement with reading and literature. Among her many achievements, she promoted the «European Award of Youth's Literature», she staged important exhibitions devoted to the history of children's literature and she was deeply committed to education of teachers and librarians to promote new partnerships in literacy education.

EET/TEE KEYWORDS: History of Children's Literature; Anna Maria Bernardinis (1932-2017); Pedagogy and Literature; Reading Education; Italy; XXth Century.

1. *Pedagogia e letteratura per l'infanzia negli anni Sessanta*

«All'inizio degli anni Sessanta, quando cominciai ad occuparmi della lettura giovanile quale problema pedagogico, la sensibilità al tema si stava appena svegliando in ambito storico e critico. L'interesse oscillava dagli aspetti epistemologici – poteva esistere una *vera letteratura* per l'infanzia e la gioventù e, se sì, con quali parametri la si poteva considerare? – a quelli metodologici ed istituzionali – la formazione delle biblioteche pubbliche per ragazzi, la preparazione degli insegnanti, l'editoria specializzata – senza che fosse possibile individuare il baricentro sul quale fondare un'articolazione sistematica degli

studi e delle proposte operative»¹. Così Anna Maria Bernardinis ricordava, nel 1988, gli inizi della sua attività di ricerca e i problemi che in quel momento si dovevano affrontare per assegnare centralità alla pedagogia in questo settore di studi e per inserirlo nei *curricula* universitari. Nell'arco di un cinquantennio, la sua indagine, rivolta principalmente all'ambito letterario, sarà destinata ad allargarsi gradualmente dall'orizzonte del destinatario della produzione letteraria in età evolutiva a quello del destinatario *tout court*, senza altra aggettivazione, e a collocare stabilmente al centro dei suoi interessi il rapporto testo-lettore.

Nata a Roma nel 1932, dopo la laurea conseguita nel 1957, aveva iniziato nel 1964 la sua attività nell'Università di Padova come assistente di ruolo in Pedagogia, dopo aver svolto un periodo come assistente volontario. Libero docente di Storia della pedagogia nel 1966, è divenuta ordinario, titolare della Cattedra di Pedagogia dal 1976, prima nella facoltà di Magistero e poi in quella di Lettere e Filosofia dal 1996 al 2007, quando ha concluso il suo servizio attivo. Dal 1969 al 1974 ha tenuto anche il Corso di Storia della letteratura per l'infanzia, dando avvio ad un insegnamento allora pressoché unico nel nostro Paese². Ha promosso e diretto vari Corsi di perfezionamento e una Scuola di dottorato sulla Pedagogia della lettura e della letteratura. Ha sviluppato un'intensa attività didattica anche all'estero: a Strasburgo e poi a Rouen, dal 1991 al 2007, nella Scuola Dottorale Europea in Scienze e teorie dell'educazione. È scomparsa, dopo lunga malattia, lo scorso 3 luglio a Padova.

Nei primi anni Sessanta, la ricerca pedagogica sulla cosiddetta «letteratura giovanile» era ancora agli inizi, nonostante fossero apparsi, fin dall'immediato dopoguerra, molti studi sulla produzione editoriale destinata al pubblico giovanile e sul rapporto fra questa produzione e l'attività educativa. L'espansione dei processi di scolarizzazione portò all'incremento delle tirature e al sorgere di nuove case editrici specializzate, mentre la crescente consapevolezza dell'influenza che i mezzi di comunicazione di massa potevano esercitare sulla formazione giovanile, promosse una rinnovata attenzione di educatori e studiosi sul problema generale della diffusione del libro e su quello, critico, dei requisiti del libro “migliore” per i ragazzi. Uno stimolo venne anche dalla introduzione della letteratura giovanile (*cenni*) nel programma di Pedagogia dell'Istituto Magistrale, come pure dalle nuove dotazioni assegnate alle Biblioteche popolari e scolastiche e dalla creazione dei “Centri di lettura”, spesso mobili. Il dibattito italiano restava ancora fortemente influenzato e diviso fra due posizioni: la prima, legata all'estetica crociana, che negava la possibilità di comporre opere d'arte per l'infanzia³, e una seconda, formulata da

¹ A.M. Bernardinis, *Biblioteca e laboratorio di lettura*, in C. Laneve (ed.), *Beni culturali e didattica. Esperienze e prospettive*, Milano, Vita e Pensiero, 1988, p. 77.

² I primi insegnamenti di Storia della letteratura per l'infanzia furono inseriti negli statuti universitari italiani fra il 1964 e il 1967.

³ Verso questa posizione, secondo cui ciò che è bello per il bambino deve essere bello anche

Giuseppe Lombardo Radice, che suggeriva di destinare ai bambini la letteratura popolare (scioglilingua, filastrocche, indovinelli, proverbi, canzoni per giochi collettivi, ninne nanne, novelle, leggende in versi, aneddoti, ecc.) poiché, nella sua visione, i termini «popolare» e «infantile» risultavano sostanzialmente sinonimi. Contrapponendosi implicitamente a Croce, il pedagogista catanese sosteneva, inoltre, che certamente non tutto ciò che è destinato agli adulti può valere anche per i bambini, ma che tutto ciò che vale per i bambini deve valere anche per gli adulti, se è vera opera d'arte. La letteratura giovanile era insomma ambigualmente contesa fra la prospettiva letterario-estetica, impegnata a definire la natura della «narrazione», e quella educativa e psicologica, preoccupata di conoscere la natura del «destinatario».

Come ricordava ancora Anna Maria Bernardinis, «gli studi storici, critici e, in misura assai inferiore, quelli teorici, rivolti a tale problematica, tendevano ad analizzare separatamente i due poli, «destinatario» e «narrazione», i quali, a loro volta, venivano sezionati nelle loro componenti e indagati, spiegati e significati da discipline diverse, non facilmente assimilabili sul piano epistemologico e tanto meno su quello metodologico⁴. Le ricerche del tempo si sviluppavano insomma in forme molto settoriali: così, ad esempio, quelle psicologiche approfondivano gli aspetti cognitivi e della socializzazione, ma trascuravano di integrarli con quelli

per l'adulto (sebbene non sia vero il reciproco), esprimeva forti riserve un autorevole pedagogista quale Giovanni Calò. Egli osservava che se lo scrittore per l'infanzia è chiamato, quanto più è possibile, a fare arte, non poteva però non fare anche psicologia, cioè saper mettersi nei panni del giovane lettore per interpretarne interessi e capacità. Nascendo da questo difficile sforzo di fusione, la letteratura-poesia per l'infanzia gli appariva il prodotto di un miracolo: «il miracolo – egli spiegava – è questo: che cioè lo scrittore per l'infanzia deve avere conservato dentro di sé e deve saper rendere nuovamente viva e attuale l'anima del fanciullo. Egli deve saper guardare, vivere, animare le cose, proprio con l'occhio e con lo spirito e col sentimento del fanciullo; ma nello stesso tempo (ecco perché la letteratura infantile, checché ne dicano alcuni, soprattutto in America, non può essere fatta che dall'adulto) egli deve avere la maturità dell'adulto per rendersi consapevole di questa sua attitudine spirituale, analoga a quello del fanciullo, per ricavare da questa attitudine i prodotti che il fanciullo da sé non saprebbe ricavarne». L'autentico scrittore per ragazzi, in quanto artista ed educatore, è pertanto assai raro (G. Calò, *Problemi attuali della pedagogia e della scuola*, Bologna, Malipiero, 1958, p. 132. Inoltre, dello stesso A., *Corso di pedagogia. La didattica*, Milano-Messina, Principato, vol. III, 1949, in part. pp. 153-160). Altri importanti contributi sul tema furono offerti da Luigi Volpicelli e Giovanni M. Bertin: il primo, rimuovendo l'equivoco crociano del quesito arte/non arte o poesia/non poesia, affermava che la validità delle opere migliori della letteratura per l'infanzia non si ricava da una loro maggiore o minore significatività in quanto opere d'arte, ma dall'importanza, in senso propedeutico, che esse riescono ad assumere nei confronti di una futura e piena fruizione estetica, la quale si raggiunge per gradi. Anche Bertin respingeva l'esigenza crociana che le opere per l'infanzia venissero giudicate in base alla loro appartenenza o meno ad un presunto regno dell'arte pura e ipotizzava la possibilità di un'«estetica infantile» tale da assumere come oggetto lo studio delle diverse preferenze che i ragazzi manifestano e da diventare così il presupposto di un'educazione del fanciullo al gusto letterario quale scoperta graduale dei valori artistici – o magari pseudoartistici – contenuti nelle opere che più appassionano i ragazzi, siano esse i romanzi o anche i fumetti.

⁴ A.M. Bernardinis, *Narrazione e pedagogia. Appunti per una ricerca*, in G. Flores d'Arcais (ed.), *Pedagogie personalistiche e/o pedagogia della persona*, Brescia, La Scuola, 1994, p. 21.

emotivi e affettivi, mentre quelle sul testo letterario privilegiavano lo studio della sua struttura, ma ignoravano l'autore e il valore della sua singolarità creativa. Tutti questi studi, sempre secondo la pedagogista padovana, «quando hanno utilizzato o indagato testi di letteratura infantile e/o giovanile, hanno dedotto la *natura* (uso questo termine improprio per riassumere tutti quegli aspetti, psicologici, etici e storico-culturali riferiti all'età evolutiva) del destinatario dall'interpretazione dei testi o, viceversa, quella dei testi (o del loro dover essere) dall'interpretazione della natura del destinatario (valgano per tutti, i lavori sulla fiaba di Propp, di Soriano, di Bettelheim)»⁵. Le due prospettive di ricerca procedevano insomma in modo separato e non comunicante, e ognuna riteneva di poter vantare una presunta «completezza» o autonomia. L'applicazione di tutte queste teorie alla lettura giovanile, sia scolastica sia extrascolastica, avveniva senza alcuna mediazione pedagogica, cioè senza una specifica riflessione su quell'atto o su quella situazione che si instaurano quando il lettore entra in rapporto con un testo e, quindi, con un autore.

2. *La ricerca teoretica e storica di A.M. Bernardinis*

In questo contesto culturale, Anna Maria Bernardinis avviò una rigorosa indagine scegliendo proprio l'approccio pedagogico e considerandolo come il solo che permette di avvertire l'interna articolazione tra diverse dimensioni: da quella estetico-letteraria a quella psicologica a quella storica ed educativa. Nel solco della teoria personalistica del Maestro, Giuseppe Flores d'Arcais, caposcuola della pedagogia padovana, e partendo quindi da un'idea di educazione come «dialogo paritario», giunse ad elaborare un concetto di lettura quale azione interpretativa e si impegnò a ricercare tutte quelle strade che, garantendo l'autonomia del lettore, potevano permettere di impostare in termini nuovi la problematica del leggere e dello scrivere letterario⁶. L'orizzonte era rappresentato da quella «pedagogia del dialogo», che considera educazione soltanto l'azione liberamente ed intenzionalmente progettata per il miglioramento della persona: implicita ricerca, confronto, valutazione, scelta, azione motivata dal convincimento. La sua indagine mirava a spiegare e legittimare il rapporto del lettore con la letteratura in termini di libertà, di sviluppo autonomo e di valorizzazione personale. Il fondamento della sua visione era ricavato dalla stessa struttura del sapere pedagogico: se esso deve necessariamente considerare sia gli aspetti diacronici sia quelli sincronici del processo di formazione, allora

⁵ *Ibid.*, p. 22.

⁶ Il programma di lavoro – da realizzare all'interno dell'allora Istituto universitario di pedagogia di Padova – è presentato in A.M. Bernardinis, *Per una ricerca pedagogica sulla letteratura giovanile*, in G. Flores d'Arcais (ed.), *La ricerca pedagogica*, Bari, Laterza, 1964, pp. 97-102.

deve necessariamente considerare anche la lettura del testo letterario, nella sua valenza, «continua», di accompagnamento della crescita etica e intellettuale del lettore e, allo stesso tempo, di dilatazione e di significazione dello spazio interpersonale.

Questa scelta rispondeva anche al bisogno, sempre più urgente nel secondo dopoguerra, di operare una radicale rielaborazione critica della cultura accademica e di rispondere alle nuove sfide sociali e educative della realtà italiana. In anni in cui le Scuole pedagogiche si dividevano secondo schieramenti ideologicamente contrapposti e affidavano alla letteratura e alla critica ruoli esplicitamente militanti, Anna Maria Bernardinis sostenne un'impostazione destinata a ridiscutere il ruolo dell'autore, del critico, dell'educatore, dell'organizzatore culturale e soprattutto del lettore. Nel suo pensiero la lettura può farsi scelta educativa, non certo prospettando un rapporto fra pedagogia e letteratura che consideri l'una in funzione dell'altra, come spesso è avvenuto nel passato, ma promuovendo nel giovane lettore la capacità di arrivare ad una interpretazione del testo, che sia azione autenticamente personale e – in quanto tale – educativa.

Da questa ricerca, fondata su una precisa visione pedagogica, sono nate le sue opere principali. In *Pedagogia della letteratura giovanile* del 1971 viene valorizzato il ruolo attivo, non solo meramente critico ma autenticamente progettuale, del lettore nella lettura dell'opera letteraria e quest'ultima viene considerata non quale strumento e medium di educazione, ma come particolare situazione esistenziale, nella quale il piano del possibile è rappresentato in tutte le direzioni dell'immaginario umano⁷. Si tratta di una situazione che può tradursi per il lettore in situazione educativa qualora egli elegga l'autore a proprio interlocutore. Questa impostazione ha portato poi, sul piano critico, all'individuazione e al rifiuto di tutte le forme di «adattamento» o di selezione dell'«adatto», molto diffuse in quel periodo, inevitabilmente destinate a funzionalizzare la letteratura ad un uso ideologico, propagandistico o politico. L'impegno della pedagogista padovana è proseguito anche in direzione storica⁸ con l'opera *Itinerari* nella quale, utilizzando le indagini di Auerbach, Scholes e Kellog, Hirsch e Havelok, indicava nelle due forme della «testimonianza» (opera di un narratore quale testimone di eventi reali) e dell'«invenzione» (opera di un narratore quale inventore di mondi possibili) le fondamentali modalità nelle quali si è realizzato e si realizza il rapporto narrativo tra autore e lettore. Lo studio si presentava come una guida critico-storica di libri per l'infanzia e per la

⁷ Ead., *Pedagogia della letteratura giovanile*, Padova, Liviana, 1971.

⁸ La proposta pedagogica che Anna Maria Bernardinis è andata sviluppando nel corso del tempo poteva contare su una vasta conoscenza storica. Gli studi giovanili su Gasparo Gozzi, il costante richiamo a Rousseau, la ripresa di studiosi come Fénelon o Necker de Saussure, il riferimento agli scritti di Pestalozzi e di Froebel stimolavano continuamente il suo dialogo con i classici della pedagogia e le consentivano – anche in campo storico – di mantenere alla sua ricerca un respiro internazionale, utilizzando autori e opere di culture e di epoche diverse.

gioventù e si proponeva di mostrare i fondamentali tipi di rapporto che il lettore può stabilire con la realtà creata dall'autore⁹. Emergeva così la possibilità di un dialogo lettore-autore, idealmente paritario, in quanto inserito, o inseribile, nella ricerca della «verità» o nel piacere dell'«invenzione». Con questa guida ogni lettore poteva organicamente comporre la propria biblioteca ideale. Nella interpretazione di Anna Maria Bernardinis, l'autentica lettura è possibile solo se aperta, disponibile, continuamente provocante e provocatoria. Ella metteva in guardia, inoltre, dai pericoli di una società in cui l'eccessivo dominio delle comunicazioni di massa rischia di affidare il leggere alla macchina o ad una estraneità anonima, inevitabilmente conformistica, privando così l'uomo, o meglio la persona, della sua realtà di «essere dialogante».

Intorno agli anni Novanta, il percorso intellettuale della studiosa padovana si approfondiva e si allargava alla considerazione del rapporto fra la produzione letteraria e il destinatario in generale, considerato cioè senza limitazioni di età. Il contesto sociale e culturale del tempo si presentava profondamente cambiato: pur nella diversità di scuole, correnti e metodologie, gli studi più avanzati convergevano però nel sottolineare il carattere dinamico di tale rapporto: «dinamismo non più spiegabile – come commentava Anna Maria Bernardinis – soltanto in termini di differenza d'età psicologica (fanciullo/adulto) o di competenza (analfabeta/alfabeta) o di consapevolezza culturale (illetterato/letterato). Dinamismo non più legato, dunque, a momenti di trasmissione di una tecnica (il leggere), di un'abilità (il saper leggere) o di uno stile di vita (il piacere di leggere) e, quindi, collocabile in uno spazio-tempo determinato, ma un dinamismo strutturante, in modo stabile, costante e continuo, il rapporto dell'uomo con la letteratura e in particolare con la narrazione»¹⁰. Nel processo di formazione della persona, la narrazione veniva ad assumere un ruolo centrale: per elaborare modelli dell'io e per l'io, per ripercorrere un itinerario soggettivo, come campo di prova, come processo e come divenire. Nel pensiero di Anna Maria Bernardinis la narrazione si profilava non tanto come un contenuto una forma dell'esperienza umana, ma come una modalità della persona: anzi, come la sua modalità fondamentale. Nella promozione di un'educazione personale, contrassegnata dal possibile, dalla storicità e della libertà, la considerazione della dimensione narrativa le appariva quindi imprescindibile.

Si apriva così l'opportunità di approfondire la possibile analogia fra il rapporto testo-autore e quello fra educatore e educando, da interpretare nel segno della continua ricerca, revisione, reinterpretazione e riproposizione dei significati dell'esperienza. Sviluppando questa intuizione, la studiosa padovana giunse a ipotizzare il discorso pedagogico «come discorso narrativo («identità di pedagogia-narrazione»), in quanto scrittura comune di esperienza personalmente

⁹ Ead., *Itinerari. Guida critico-storica di narrativa e divulgazione per l'infanzia e la gioventù*, Milano, Fabbri, 1976.

¹⁰ Ead., *Narrazione e pedagogia. Appunti per una ricerca*, cit., p. 23.

significata e intenzionalmente testimoniata all'altro da sé, da un protagonista, che si propone come protagonista, cioè come autore della propria esperienza, ma che chiede, esige l'ascolto, l'interpretazione, l'integrazione da parte dell'altro, sentito come altro protagonista, altro autore di vita, di significati e di valori, di progetti esistenziali»¹¹. La pedagogia della persona si presentava in tal modo come narrazione, racconto, storia, in cui l'io si offre nelle testimonianze, anzi come testimone di una realtà vissuta. Questo suggestivo percorso era destinato a interrompersi bruscamente e a lasciare appena abbozzati alcuni temi di indagine: da quello dell'autore a quello della scrittura e dell'autobiografia a quello dello spazio letterario¹². Restava comunque esplicita l'esigenza di porre al centro del discorso pedagogico fondato sulla persona e sulla libertà, da una parte, la riflessione circa la natura della relazione dell'autore con la propria opera letteraria e con il proprio destinatario e, dall'altra, la definizione e la verifica della funzione assegnata, o semplicemente riconosciuta, a tale relazione nel pensiero e nelle pratiche educative del presente e del passato.

3. *L'impegno organizzativo e promozionale*

L'impegno teoretico e storico è stato una parte – sicuramente una parte importante – ma non l'unica dell'attività di Anna Maria Bernardinis. Sin dagli inizi del suo percorso accademico, perseguì con tenacia il progetto di creare una vera e propria struttura universitaria in cui poter svolgere ricerca, elaborare progetti per la formazione del giovane lettore, analizzare criticamente le proposte editoriali rivolte al pubblico dei bambini e dei ragazzi. Le sue iniziative sono state pionieristiche in Italia: esse hanno tentato di coniugare continuamente gli aspetti teorici con quelli operativi e hanno saputo affrontare i problemi anche attraverso un vivace confronto a livello internazionale. Grazie al suo impegno, l'Università di Padova – prima in Italia – poté costituire un Gruppo di ricerca e avviare una Scuola di letteratura per l'infanzia, basata su un preciso fondamento pedagogico e su un concreto modello metodologico-operativo¹³. In una apposita sede, dal 1962, venne precisandosi e ampliandosi

¹¹ *Ibid.*, p. 341.

¹² Fra i saggi di quest'ultimo periodo, ricordiamo *Autorevolezza letteraria ed educativa*, «Rassegna di pedagogia», vol. 51, n. 3, 1993, pp. 199-207; *Pestalozzi: il racconto come discorso pedagogico*, «Rassegna di pedagogia», vol. 54, nn. 1-2, 1996, pp. 81-94; *L'autorità dello scrittore nell'Emilio di Rousseau e nelle scuole nuove*, «Rassegna di pedagogia», vol. 56, nn. 1-2, 1998, pp. 49-59. Per una bibliografia quasi completa degli scritti di A.M. Bernardinis, cfr. W. Böhm (ed.), *Dire, leggere, ascoltare*. Saggi in onore di Anna Maria Bernardinis, «Rassegna di Pedagogia», vol. 66, nn. 1-4, 2008, pp. 309-317.

¹³ Cfr. D. Lombello, *La letteratura per l'infanzia a Padova*, in W. Böhm, L. Santelli, G. Zago (edd.), *Il contributo della 'Scuola padovana' allo sviluppo delle scienze pedagogiche e didattiche*, «Rassegna di Pedagogia», vol. 72, nn. 3-4, 2014, pp. 307-330.

quella Biblioteca-laboratorio che è stata denominata Sezione di pedagogia della lettura e successivamente Settore di ricerca sulla lettura e la letteratura giovanile. Si trattava di una struttura unica nella realtà universitaria italiana, che faceva tesoro di esperienze a livello internazionale, come quelle di Francoforte, di Monaco e di Parigi Nord. La Biblioteca-laboratorio era organizzata per spazi aperti, di lettura e di consultazione. La struttura – anche fisicamente – nasceva dall'incrocio di due criteri organizzativi: quello verticale delle età e quello orizzontale dei generi letterari. Si trattava di scelte dettate da due motivazioni: verificare i criteri editoriali della graduazione del materiale di lettura per fasce d'età (quasi sempre corrispondenti con i livelli scolastici) e illustrare, attraverso i generi letterari, le diverse modalità del rapporto tra l'autore e il suo pubblico. Nel Settore di ricerca dell'Università patavina diretto da Anna Maria Bernardinis funzionavano quindi alcune biblioteche specializzate (per lettori 0-6, 6-14 e 14-18 anni; informazione e critica) che raccoglievano migliaia di opere, italiane e straniere, di diverso genere (narrativa, poesia, divulgazione, album, periodici, saggistica...).

La struttura voleva essere un contenitore di letture, dinamicamente flessibile, ma anche uno stimolo alla ricerca. Essa nasceva con tre obiettivi principali: la «documentazione» (di quanto era proposto al pubblico giovanile per il tempo libero e per quello parascolastico), la «sperimentazione» (dei sistemi di catalogazione del materiale, dei livelli di comprensione della lettura, delle metodologie proposte, dei contenuti, ecc.) e la «indagine» teorica, critica e storiografica. Questa struttura, rivolta ad un vasto pubblico, accoglieva, senza scelta o censura preventiva, catalogava e rendeva disponibile una produzione editoriale assai raramente conservata e la offriva a lettori in età evolutiva, ad insegnanti e a bibliotecari. Il funzionamento di una simile realtà rimase sempre complesso in quanto era chiamata a svolgere compiti di documentazione, consulenza e aggiornamento metodologico verso l'esterno e a definire una legittimazione epistemologica, tale da garantire la didattica e la ricerca, all'interno, cioè in ambito universitario. Queste diverse competenze e questi differenti obiettivi hanno imposto una continua revisione di ipotesi, di programmi ed anche un serrato confronto con premesse e metodi originati da altre impostazioni, culture o situazioni storiche.

Connessa a queste ricerche ed esperienze è stata l'azione di Anna Maria Bernardinis e del Gruppo padovano a favore della diffusione delle «biblioteche giovanili». Il problema era affrontato ovviamente in chiave pedagogica, senza alcun cedimento a riduzionismi didattici o d'altro genere. La biblioteca era considerata, più che come un contenitore di libri, come uno «spazio educativo» cui era assegnato un impegnativo compito: formare i lettori, intendendo con questo termine non tanto coloro che «sanno leggere», avendolo imparato a scuola, ma soprattutto coloro che «sanno scegliere». Come spiegava la Nostra, «se è giusto che la scuola persegua l'obiettivo di insegnare a leggere e a saper leggere, formando «lettori maturi» e criticamente avvertiti e quindi frequentatori

capaci di utilizzare i servizi bibliotecari, la biblioteca dovrebbe fornire l'occasione della scoperta e della conquista del «perché» leggere, cui dovrebbe conseguire il «come» ed il che «cosa» leggere, sino alla possibilità di formulare una propria personale biblioteca, sia pure di un solo libro o virtualmente aperta tutti i libri, a tutti gli autori possibili»¹⁴. Alla promozione di questo vasto progetto, il Gruppo diretto dalla studiosa padovana ha lavorato alacramente realizzando ricerche, seminari, convegni e corsi di formazione per insegnanti e bibliotecari. Una speciale attenzione è stata riservata al problema della catalogazione e alla funzione che essa può svolgere per favorire la formazione del giovane lettore.

Anna Maria Bernardinis ha saputo promuovere e coltivare anche intensi rapporti e collaborazioni con centri e studiosi di vari paesi europei, ed è riuscita ad animare quello che si potrebbe definire un gruppo di ricerca internazionale, sostenuto da relazioni di alto profilo culturale e umano. Esempio, a questo proposito, appare la vicenda del Premio europeo di letteratura giovanile, dovuto soprattutto al suo impegno creativo e organizzativo. Sorto nel 1962, cioè nello stesso anno della costituzione del Settore, il Premio è stato dapprima sostenuto dalla città di Caorle¹⁵, poi dalla Provincia autonoma di Trento e infine dalla Provincia di Padova, fino alla sua conclusione avvenuta nel 1993. Come sottolineò ripetutamente la Nostra, per la prima volta un'Università si faceva promotore di un Premio e riusciva ad assicurare all'iniziativa indipendenza dal mercato editoriale, sia nella composizione della giuria sia nella valutazione delle opere, che sarebbe stata condotta esclusivamente sulla base di rigorosi criteri scientifici. Fin dai suoi esordi, inoltre, il Premio si dimostrò in grado di mettere insieme e comporre esperienze culturali di diversa provenienza nazionale: nel nome della letteratura per l'infanzia, riuscì a creare tavoli di incontro e di collaborazione tra studiosi dell'Est e dell'Ovest.

Legati a queste attività sono stati i proficui rapporti creati con diversi Enti del territorio, con manifestazioni in collaborazione che interpretavano intelligentemente quella che oggi viene definita la “terza missione” dell'Università. Con il Comune di Padova, nei primi anni Ottanta, Anna Maria Bernardinis promosse e curò due importanti mostre storiche, con relativi convegni e pubblicazioni: *Bambini e libri: figure e storie nei libri per bambini dal Cinquecento al Settecento* e poi *Il bambino e la sua cultura nella Padova dell'Ottocento*¹⁶. La riflessione storico-sociale sull'infanzia era appena avviata nella ricerca pedagogica italiana e Anna Maria Bernardinis aveva

¹⁴ A.M. Bernardinis, *Appunti per una pedagogia della biblioteca*, in Ead. (ed.), *Per una pedagogia della biblioteca giovanile*, Padova, Imprimitur, 1995, p. 265.

¹⁵ Cfr. S. Fava, *Per un'educazione giovanile europea alla lettura: «Il premio europeo Città di Caorle» (1962-1968)*, «History of education & Children's Literature», vol. 11, n. 2, 2016, pp. 317-347.

¹⁶ *Bambini e libri. Figure e storie nei libri per bambini dal Cinquecento al Settecento*, Catalogo della Mostra, Comune di Padova, 1980; *Il bambino e la sua cultura nella Padova dell'Ottocento*, Catalogo della Mostra, Comune di Padova, 1981.

già cercato di svilupparla in forme originali. La realizzazione di una Mostra e di un Catalogo mirava a far dialogare e collaborare studiosi di discipline apparentemente lontane, ma aveva anche lo scopo di far conoscere meglio le molteplici potenzialità di ricerca presenti nel Settore di letteratura giovanile da lei guidato. Nella sua multiforme attività, durata per oltre mezzo secolo, va ricordato ancora il suo impegno nella Sezione italiana dell'IBBY (di cui è stata presidente per diversi anni) e il suo ampio lavoro all'interno della Fondazione Collodi, che la portò anche a curare l'organizzazione di una decina di edizioni del «Compleanno di Pinocchio», concorso nazionale riservato alle scuole e alle biblioteche italiane.

Questo patrimonio di idee e di esperienze lasciato da Anna Maria Bernardinis rappresenta, nel campo della pedagogia della letteratura per l'infanzia, una preziosa eredità sulla quale certamente si dovrà tornare a riflettere.

Redi Sante Di Pol (1951-2017)

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Redi Sante Di Pol (1951-2017)

ABSTRACT: The article is a reminder of Redi Sante Di Pol, full professor of History of Pedagogy at the University of Turin, recently and prematurely dead. The author reconstructs with great detail a complete bio-bibliographic profile of an illustrious exponent of the contemporary Italian pedagogical culture.

EET/TEE KEYWORDS: History of Pedagogy; History of Education; Pedagogical culture; University of Torino; XX-XXIth Centuries.

Il 25 agosto 2017 è mancato a Torino il prof. Redi Sante Di Pol dopo una lunga e invincibile malattia combattuta con grande determinazione. Nato il 6 febbraio 1951 a Cavasso Nuovo (Pordenone) Redi giunse presto con i genitori a Torino, ma sempre rivendicò le sue origini friulane e friulano fu di temperamento per tenacia nel lavoro, chiarezza nel perseguimento degli obiettivi, fermezza nella difesa dei principi. Nel 1973 conseguì la laurea in Pedagogia con una tesi preparata con Remo Fornaca. In quello stesso anno gli fu conferito un contratto che, con il tempo, si trasformò in un posto stabile da ricercatore. Da lì in poi ininterrottamente per 44 anni fu docente nell'Università di Torino, dal 1998 come professore associato e, quindi, dal 2002, come professore ordinario.

Fin dalle prime ricerche il prof. Di Pol orientò i suoi studi verso le tematiche scolastiche. Nel 1977 uscì il suo primo libro, *Una scuola da riformare*, dedicato alla complessa realtà della scuola secondaria superiore che sembrava alla vigilia di una grande riforma. Fecero seguito numerosi saggi ospitati sulle più importanti riviste pedagogiche, in specie su «I Problemi della pedagogia».

Attraverso questi primi scritti si andò delineando l'approccio storiografico che l'avrebbe accompagnato negli studi futuri. Di Pol condivise la nuova stagione di ricerche storico-pedagogiche che si stava allora aprendo, impegnata a superare l'identificazione della storia pedagogica con la storia del pensiero pedagogico e ad assicurare l'adeguata contestualizzazione del fatto educativo entro un più

vasto reticolo culturale, sociale, politico. La vivacità delle contrapposizioni di parte di quegli anni se scontava alcuni vistosi limiti ideologici (con il ricorso a un uso talvolta disinvolto della documentazione), tuttavia apriva la pedagogia al confronto con nuove istanze come, ad esempio, gli aspetti politici della vita scolastica messi in campo dalle vicende sessantottine appena trascorse, le marginalità sociali, la realtà infantile e femminile, le forze economiche, l'esperienza religiosa.

Il tal modo si sottraeva la storia pedagogica, d'un lato, a una storica autoreferenzialità e, dall'altra dalla dipendenza dalla filosofia, inquadrandola nel più ampio flusso delle dinamiche della vita civile. Nel 1975 Fornaca concorse con il saggio sulla ricerca storico-pedagogica a rafforzare questa tesi storiografica che aveva antecedenti importanti in Gambaro, Calò e Borghi, saggio che naturalmente non sfuggì all'attenzione del giovane studioso.

Di Pol integrò questa visione della ricostruzione pedagogica con una puntigliosa documentazione sia sotto il profilo dei riferimenti normativi (a testimonianza di una robusta cultura giuridica) sia con un utilissimo ricorso all'eloquenza dei dati statistici fino al punto da pubblicare nel 1993 un intero volume sugli aspetti quantitativi della storia scolastica (*La scuola in cifre. Analisi dei fenomeni quantitativi dell'istruzione infantile e dell'obbligo in Italia dal 1945 ad oggi*). Con il richiamo all'obiettività del diritto e dei dati quantitativi si proponeva di orientare il dibattito storiografico entro canali affidabili.

Nel 1981 insieme a Fornaca diede alle stampe la fortunata antologia dedicata alla pedagogia scientifica del Novecento, libro su cui si sono formate legioni di studenti degli allora istituti magistrali e dei primi corsi universitari, poi riedita con aggiornamenti e integrazioni nel 1993 con il titolo *Dalla certezza alla complessità*. Il tema della pedagogia scientifica andò ad affiancarsi alle ricerche storico scolastiche che frattanto si rivolsero verso l'età giolittiana e l'ambiente pedagogico e scolastico torinese, con una particolare e originale attenzione sul rapporto tra istruzione e crescita produttiva. I frutti di queste indagini confluirono in due volumi: *Studi sulla pedagogia scientifica in Italia* (1988, con un denso saggio su Maria Montessori) e *Scuola e sviluppo economico dell'Italia giolittiana (1900-1915)*.

Tra gli anni Ottanta e Novanta il curriculum biografico di Di Pol segnala una svolta importante nel senso dell'impegno extra accademico con l'assunzione di incarichi sempre più importanti nell'ambito della Fism, Federazione italiana scuole materne (fino alla presidenza nazionale), il sodalizio che tuttora rappresenta e tutela la maggior parte delle istituzioni educative dell'infanzia non statali.

Sul piano locale, in particolare, sviluppò un'azione capillare per evitare la chiusura di numerosi istituti organizzando soluzioni alternative alla diminuzione del personale religioso mediante il coinvolgimento delle famiglie e stabilendo contatti con gli enti locali, contatti via via più difficili per la diminuzione delle risorse ma anche per la diffidenza manifestata da taluni parti politiche (tuttora

persistenti) verso quelle che impropriamente erano definite “scuole private”. Operò inoltre per qualificare e migliorare la preparazione degli insegnanti, convinto che la scuola è buona solo se gli insegnanti sono preparati, impresa nella quale agì d’intesa con un altro esperto di valore e figura significativa nella Torino pedagogica come il prof. Walter Ferrarotti, anch’egli precocemente scomparso nel dicembre 2007.

Questa integrazione della vita accademica con l’impegno diretto nel campo educativo-sociale ha svariate ragioni: alcune di natura strettamente personali connesse alla sua visione dell’impegno cristiano nella società, altre più legate a motivazioni politiche (per molti anni fu un dirigente locale del partito della Democrazia Cristiana) e infine altre ancora dovute a visione «liberale» e anti statalista della vita scolastica con la conseguente energica difesa del principio della libertà scolastica. La legge sulla parità del 2000 gli sembrò, fin dalla sua promulgazione, un provvedimento parziale che avrebbe dovuto essere completato anche con il riconoscimento economico.

I crescenti impegni extra accademici non gli impedirono di continuare gli studi e di dare organica sistemazione a un imponente materiale che nel frattempo aveva raccolto sulla storia del maestro elementare italiano e, più in generale, sulla storia dell’istruzione di base. Nel 1998 uscì il suo libro forse più noto e spesso citato, *Cultura pedagogica e professionalità nella formazione del maestro italiano. Dalle scuole di metodo all’istituto*, poi completato, sotto molti aspetti, dal grande affresco sulla storia della «scuola per tutti gli Italiani» apparso, tuttavia, molti anni dopo, soltanto nel 2016.

Raggiunta l’associazione universitaria e, poco dopo, l’ordinariato Di Pol fu coinvolto in modo sempre più impegnativo negli aspetti organizzativi legati ai corsi di studi e, in specie, a quello di Formazione primaria nel quale entrò quasi subito ad insegnare e di cui fu presidente per un decennio (2005-2015) con un impegno davvero senza risparmio. Pur in condizioni di grande difficoltà, preso tra le scadenze universitarie e gli assillanti impegni della Fism, non mancò di assicurare la propria collaborazione alla redazione del *Dizionario Biografico dell’Educazione* (per il quale compilò molte e significative voci) e di presenziare agli annuali convegni bresciani dei pedagogisti cattolici.

Sono infine da segnalare i numerosi incarichi ricoperti all’esterno all’Università, oltre a quelli già ricordati nell’associazionismo delle scuole paritarie dell’infanzia: insegnò per molti anni presso l’Istituto Superiore di Scienze Religiose di Torino; fu componente del Consiglio Direttivo dell’Irrsae Piemonte (1998-2001) e poi del Comitato tecnico-scientifico dell’Irre Piemonte (2002-2005); partecipò attivamente dal 1998 al Consiglio nazionale della Scuola Cattolica presso la Cei e nel 2009 entrò a far parte del Consiglio direttivo del Centro Studi per la Scuola Cattolica.

Un recente colloquio internazionale di studi sulla cultura materiale della scuola e sulle nuove sfide che attendono la ricerca storico-educativa

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A recent international conference on school material culture and the new challenges facing the historical educational research

ABSTRACT: This contribution intends to present the results of the III «International Conference on School Material Culture», entitled *Production, Use and Circulation of School Furnishings and Teaching Aids between Europe and Latin America in XIX and XX Centuries*, which was held in Macerata between 12-13 September 2017. The Conference – which gathered participants from Latin-American and European countries – was the occasion to discuss on school material culture and to exchange ideas and perspectives about the challenges awaiting scholars engaged in the historical-educational field. On the day of September 13 and in the presence of academics from twelve Italian Universities, the new *Italian Society for the study of Historical-Educational Heritage* (SIPSE) was also established, following the model of the Spanish SEPHE, with the statutory aim of fostering high-quality scientific research on school material culture and promoting the value of educational heritage in the scientific community and within civil society as well.

EET/TEE KEYWORDS: History of Education; School Material Culture; Educational Heritage; Teaching Aids; Europe; Latin America; XIX-XXth Centuries.

Una preziosa e feconda occasione per avviare un dibattito di ampio respiro di carattere internazionale sulla cultura materiale della scuola e sulle nuove sfide che attendono la ricerca storico-educativa: questo è stata la III «International Conference on School Material Culture», dal titolo *Production, Use and Circulation of School Furnishings and Teaching Aids between Europe and Latin America in XIX and XX Centuries*, svoltasi il 12 e 13 settembre 2017 presso il Polo didattico «Pantaleoni» dell'Università degli Studi di Macerata.

L'incontro, che ha visto la partecipazione di oltre sessanta studiosi provenienti da atenei di ogni parte del mondo, ha inteso offrire a ricercatori italiani, iberici e latino-americani attualmente impegnati in studi relativi all'evoluzione della cultura materiale della scuola, un'occasione di riflessione e approfondimento su questo recente filone della ricerca storico-educativa, al fine di definirne il potenziale storiografico e metterne a fuoco le specificità metodologiche. Un filone di studi che, nel corso dell'ultimo quindicennio ha prodotto in Europa (particolarmente in Spagna e in Portogallo, oltre che in Italia) e in America Latina (soprattutto in Brasile e in Argentina) ricerche e studi significativi a marcata vocazione internazionale.

In questa terza edizione¹ – organizzata dal «Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia» (CESCO) dell'Università degli Studi di Macerata – i contributi dei relatori si sono concentrati in particolare sulla produzione, l'uso e la circolazione di arredi e sussidi scolastici tra Europa e America Latina tra '800 e '900.

Ad introdurre e moderare il convegno è stato Roberto Sani che, nella sua relazione d'apertura, dopo aver definito con precisione quale sia l'oggetto di studio della cultura materiale della scuola e tracciato un bilancio sullo stato dell'arte della ricerca, ha sottolineato come lo scopo del colloquio internazionale sia stato quello di focalizzare l'attenzione sulle finalità, sull'approccio e sulle metodologie d'indagine che debbono caratterizzare un filone di studi come quello della cultura materiale della scuola. Uno scopo che gli studiosi si propongono di perseguire mettendo a confronto due differenti storiografie, due tradizioni di ricerca – quella italiana e quella brasiliana – che hanno dato significativi contributi allo sviluppo di tale filone di studi e che puntano ad approdare ad una storia totale (materiale e immateriale) della scuola, «nella consapevolezza di una stretta correlazione e interdipendenza tra aspetti ed elementi 'materiali' e caratteristiche e dimensioni 'immateriali' della realtà scolastica».

La prima relazione della giornata è stata tenuta da Anna Ascenzi (*Paolo Pigna Paper Mill and the Industrial Production of School Exercise-Books between '800 and '900*) che ha analizzato la produzione italiana dei quaderni di scuola a cavallo tra il diciannovesimo e ventesimo secolo. Il *focus* dell'intervento

¹ Le precedenti edizioni di questo colloquio internazionale si tenute presso la Universidade Federal do Paraná a Curitiba (Brasile) nel novembre 2015 e presso il «Centro Internacional de la Cultura Escolar» (CEINCE) a Berlanga de Duero (Spagna) nel giugno 2016.

ha riguardato in particolare la storica azienda *Cartiere Paolo Pigna* di cui l'autrice ha ricostruito le principali fasi storiche e il ruolo giocato dalla stessa azienda nel quadro nazionale. Il quaderno scolastico emerge come un prodotto industriale ma al tempo stesso come uno strumento cruciale per la trasmissione di un preciso messaggio educativo, culturale e anche ideologico veicolato attraverso gli elementi solo apparentemente accessori costituiti da titoli, motti, vignette, brevi testi educativi e infine le illustrazioni appositamente progettate per le copertine. Il successivo intervento, a cura di Juri Meda (*Origins and Development of the Italian Educational Industry from '800 to '900*) ha ricostruito le problematiche legate alla nascita e all'affermazione di una specifica industria per la scuola tra Ottocento e Novecento, che fu determinata dall'introduzione dell'obbligo scolastico e che portò le imprese private italiane a competere con una produzione internazionale già affermata e pienamente sviluppata. Il medesimo tema è stato affrontato da Marta Brunelli (*Rise and Fall of German School Scientific Instruments in Italy, through the Collections of Italian School Museums*), che ha posto altresì l'accento sulle potenzialità di una nuova fonte storica rappresentata dai cataloghi scolastici. L'analisi di questi particolari repertori – confrontati con le evidenze oggettuali riscontrate nelle collezioni didattiche delle scuole di antica fondazione – getta nuova luce sui meccanismi di produzione e soprattutto di distribuzione dei sussidi didattici, stranieri prima, italiani poi, nelle scuole della Penisola tra la fine dell'Ottocento e la prima metà del Novecento. Alberto Barausse e Michela D'Alessio (*The School Inspectors' Functions and the School Material Culture: the Case Study of Molise and Basilicata Regions*) hanno invece indagato le funzioni del corpo ispettivo in relazione alla cultura materiale della scuola con specifico riferimento alle realtà territoriali del Molise e del Basilicata, analizzando in particolare quelle prescrizioni e quelle regole che accompagnarono la costruzione materiale della scuola nei decenni post-unitari. Le Esposizioni Universali e l'influenza che esse esercitarono sulla modernizzazione della scuola italiana rappresentano il tema centrale del lavoro di Valeria Viola (*At School of Modernity: School Furnishings and Teaching Aids on Display at the World Expositions*) che, a partire dalla *Great Exhibition* di Londra del 1851, primo riuscito tentativo di sinergia tra sistema d'istruzione e industria, ha mostrato come nelle esposizioni universali si sia gradualmente affermata una crescente attenzione verso il settore dell'educazione: ciò ha permesso, da una parte, di cogliere e registrare i movimenti e le tendenze dell'industria scolastica internazionale, dall'altra di evidenziare il ruolo marginale dell'Italia in questo settore. Il contributo di Domenico Elia (*Origins and Development of the Production of Gymnastic Tools for Italian Schools during the Liberal Age*) ha rivolto la propria indagine alla storia sportiva materiale e in particolare alle origini e allo sviluppo degli strumenti ginnici nella scuola italiana in età liberale, un campo di ricerca relativamente recente, ad eccezione dei primi contributi storiografici in tal senso a partire dalla seconda metà degli anni Ottanta. La mattinata si è chiusa

con l'intervento di Fabio Targhetta (*To Crush Italy from Foreign Vassal. The Origins of Italian Production of Visual Educational Aids*) che ha sottolineato come nello studio della produzione italiana di sussidi didattici visivi, in particolar modo per quanto riguarda l'insegnamento della geografia, lo storico debba tenere in conto tre dimensioni principali: quella economica, che rimanda al progressivo sviluppo in senso tecnologico-industriale di un comparto che, in Italia, risultava ancora arretrato rispetto ad altre nazioni; la dimensione politico-ideologica, giacché sulla cartografia si fonda la rappresentazione di un immaginario collettivo di "nazione" strettamente legato alla costruzione e/o rafforzamento dell'identità nazionale; infine la dimensione didattica, relativa al reale utilizzo di tali sussidi in classe.

Il pomeriggio della prima giornata del colloquio, moderato da Alberto Barausse, ha quindi visto la partecipazione di importanti studiosi provenienti da alcuni prestigiosi atenei brasiliani. Il primo intervento (*World Expositions, Pedagogical Museums and Compulsory Education: contact points and differences*), presentato da Gizele De Souza e da Vera Lucia Gaspar Da Silva, ha illustrato l'influenza reciproca esercitata dalle Esposizioni Universali e dalla costituzione dei Musei Pedagogici sull'istruzione obbligatoria, illustrando quei materiali scolastici di utilità pratica per l'insegnamento elementare che hanno contribuito allo sviluppo delle scuole stesse in varie epoche e in diversi territori. Heloísa Helena Pimenta Rocha, nel suo contributo (*Material Culture, Hygiene and Child Schoolarisation*) ha indirizzato la propria indagine sulla componente fondamentale della scolarizzazione dell'infanzia rappresentata dall'educazione igienica, per la quale furono prodotti e distribuiti appositi sussidi, in particolare manuali scolastici e libri di letture curati dall'editore *Melhoramentos*, del quale sono ricostruiti con dovizia di particolari la storia e la fitta rete costruita con altri editori. Juarez José Tuchinski Dos Anjos ha quindi sviluppato una relazione (*Brazil Sources for a History of the School Material Culture during the Empire of Brazil from the Archives of Brazilian Parliament, 1826-1834*), incentrata sui repertori delle fonti per una storia della cultura materiale della scuola presenti negli archivi del Parlamento brasiliano: petizioni, lettere, pareri tecnici, progetti e altra preziosa documentazione presente negli archivi di Camera e Senato costituiscono la base per lo studio approfondito della storia della scuola e della sua cultura materiale durante il periodo dell'Impero brasiliano. Molto apprezzato anche il contributo di Andréa Bezerra Cordeiro (*Author in the Production of School Furniture and Teaching Aids at the Beginning of the XX Century in Argentina*) che ha cercato di sottolineare il contributo offerto dai docenti nella progettazione, produzione e selezione di arredi e di sussidi scolastici nel corso del ventesimo secolo in Argentina, con particolare attenzione per la figura e l'operato del professore Antonio Díaz. Alberto Barausse ha invece incentrato la sua relazione (*The Italian Consuls and the Problem of the Material Culture for the "Italianity" in Ethnic Schools of Brazil*) sul prezioso ruolo svolto dai consoli e agenti consolari italiani in Brasile,

e in particolare nello stato del Rio Grande do Sul, con riferimento specifico alle strategie educative e scolastiche da essi adottate in favore del mantenimento di un sentimento patrio nelle colonie degli immigrati italiani. Eliane Peres e Vania Grim Thies (*Brazil Archives' Policy for the Historical-Educational Research: the case of HISALES. History of Literacy, Reading, Writing and Textbooks*) hanno quindi illustrato la storia, lo sviluppo e le funzioni del *centro de memória escolar* «HISALES» (*História da Alfabetização, Leitura, Escrita e dos Livros Escolares*), un centro di documentazione e ricerca sorto nel giugno del 2006 presso l'Universidade Federal de Pelotas e finalizzato allo studio della storia dell'alfabetizzazione in Brasile e della produzione di libri e materiali scolastici in alcuni stati brasiliani. A chiudere la prima giornata del colloquio internazionale ha infine provveduto Etienne Baldez Louzada Barbosa che, nel suo contributo (*The School Material Culture Indicated by the Inspectorates of Public Education during the Empire of Brazil*), ha ripercorso gli sviluppi della cultura materiale della scuola in Brasile attraverso le indicazioni fornite nel corso della seconda metà dell'Ottocento dagli ispettori dell'istruzione pubblica e soprattutto si è interrogata sulle modalità adottate dagli ispettori stessi per la scelta di metodi, libri e arredamento scolastico all'interno delle scuole brasiliane.

La seconda giornata del convegno maceratese ha altresì costituito la giusta occasione per implementare concretamente e in un'ottica di lungo periodo gli studi sulla cultura materiale della scuola. Proprio per questo motivo dodici docenti (Anna Ascenzi, Gianfranco Bandini, Alberto Barausse, Antonella Cagnolati, Francesca Borruso, Vittoria Bosna, Michela D'Alessio, Mirella D'Ascenzo, Carla Ghizzoni, Brunella Serpe, Carla Callegari, Annemarie Augschöll) di altrettanti atenei italiani, hanno sottoscritto l'atto costitutivo e lo statuto della SIPSE-*Società Italiana per lo studio del Patrimonio Storico-Educativo*, sorta sul modello della SEPHE-*Sociedad Española para el Estudio del Patrimonio Histórico-Educativo*, con l'obiettivo dichiarato di promuovere e favorire ricerche di elevata qualità scientifica e iniziative di alto profilo culturale sull'importanza del patrimonio storico educativo. Contestualmente i soci fondatori della neo-costituita società hanno eletto il primo Comitato Organizzatore, presieduto da Anna Ascenzi (Università degli Studi di Macerata), che avrà il compito di traghettare l'associazione alla costituzione del primo Consiglio direttivo. Il Comitato è formato dai proff. Anna Ascenzi (Università degli Studi di Macerata), Gianfranco Bandini (Università degli Studi di Firenze), Alberto Barausse (Università degli Studi del Molise), Vittoria Bosna (Università degli Studi di Bari), Antonella Cagnolati (Università degli Studi di Foggia), Carmela Covato (Università degli Studi di Roma Tre), Michela D'Alessio (Università degli Studi della Basilicata), Mirella D'Ascenzo (Università degli Studi di Bologna), Carla Ghizzoni (Università Cattolica del Sacro Cuore di Milano), Brunella Serpe (Università della Calabria), Giuseppe Zago (Università degli Studi di Padova) e Annemarie Augschöll (Libera Università di Bolzano).

In qualità di segretario è stato nominato Juri Meda (Università degli Studi di Macerata).

Ben collocato all'interno della III edizione della «International Conference on School Material Culture» è risultato il workshop *The History of Education and Children's Literature in Italy between the Requirements of ANVUR and the New Perspectives for Cultural Growth and Internationalisation* che ha impegnato l'intera mattinata del 13 settembre. A Roberto Sani il compito di introdurre un tema che ha coinvolto un numero considerevole di studiosi di Storia della pedagogia e di Letteratura per l'infanzia, animati dalla comune volontà di riflettere sulla situazione presente e sulle prospettive per il futuro delle proprie discipline e del proprio ambito di studi, alla luce dei rapidi e profondi mutamenti che hanno caratterizzato – e stanno caratterizzando – non solo la realtà universitaria e l'istruzione superiore nel Paese ma anche gli stessi saperi disciplinari e la stessa fisionomia, organizzazione e valutazione della ricerca scientifica sul versante umanistico e delle scienze sociali (ivi comprese le discipline storiche e le scienze dell'educazione).

Come opportunamente sottolineato da Sani «tali rapidi e profondi mutamenti hanno finito per riverberarsi pesantemente non solo sui risultati, ma anche sulle pratiche e sugli obiettivi e indirizzi della ricerca stessa, condizionando pesantemente tutti gli aspetti e le dimensioni del lavoro dei docenti universitari». Di qui, proprio al fine di fronteggiare questa logica imperante degli adempimenti, la necessità e l'urgenza, come comunità accademica di M-Ped 02, di recuperare «l'esercizio di una seria e organica progettualità culturale e scientifica in seno al nostro settore di ricerca». Per realizzare tale obiettivo Sani ha auspicato una grande coesione e una piena condivisione di strategie e di obiettivi tra i docenti, anche perché la logica punitiva che ispira i recenti provvedimenti MIUR (dai drastici tagli all'FFO, il Fondo di Finanziamento Ordinario degli Atenei, all'istituzione delle cosiddette «cattedre Natta» per professori eccellenti selezionati dal governo, per citare solo i più recenti) ha fatto leva proprio sull'isolamento dei singoli docenti, sulla frammentazione delle comunità accademiche di settore, sulla sostanziale inadeguatezza culturale e scientifica di chi si accontenta e fa propria la «logica degli adempimenti». Di qui l'invito caloroso dello stesso Sani a dare vita ad una nuova fase di confronto e di progettualità in seno alla comunità accademica che «coinvolga liberamente tutte le sedi e tutti i colleghi 'di buona volontà'» e che abbia nel CIRSE (Centro Italiano per la Ricerca Storico-Educative), e – per quel che concerne il più ristretto ambito degli studi sul patrimonio – nella neonata SIPSE (*Società Italiana per lo studio del Patrimonio Storico-Educative*), «la sua 'cabina di regia' e i suoi luoghi di elaborazione e di coordinamento». Sani ha quindi ceduto la parola a colleghi e studiosi provenienti da sedi accademiche italiane dislocate nell'intero territorio nazionale. Milena Bernardi ha non a caso sottolineato la necessità di replicare periodicamente incontri come quello maceratese al fine di mettere in luce le difficoltà presenti della ricerca e soprattutto per individuare

possibili scenari futuri di ripresa e crescita della comunità scientifica, a difesa di una qualità della ricerca che va necessariamente protetta «da quell'ottica di casta dominante», che oggi sta paralizzando e penalizzando l'intero sistema universitario. Giorgia Grilli ha poi ribadito, soprattutto con specifico riferimento al mondo della letteratura per l'infanzia, l'opportunità impellente di scongiurare il rischio di un netto e pericoloso scollamento tra il mondo accademico e quello non accademico, e ha invitato l'intera comunità a non accantonare mai, nonostante i numerosi adempimenti burocratici da cui oggi si è vincolati, quell'«indomabile slancio interiore» verso una ricerca di qualità che dovrebbe animare ogni studioso. Francesca Borruso ha invece insistito sugli innegabili progressi compiuti dalla storiografia di settore che, negli ultimi trent'anni, ha raggiunto evidenti traguardi a suo tempo insperabili. Proprio dalla certezza di aver costruito qualcosa di importante sarà necessario ripartire per vincere le nuove sfide legate all'internazionalizzazione e per indagare con competenza quei nuovi ambiti di ricerca che si stanno con forza affacciando nel panorama storiografico italiano e che sicuramente potranno arricchire l'intera comunità accademica. Per Vittoria Bosna è necessario allontanarsi il più possibile dalla logica schiacciante degli adempimenti e riconsiderare al più presto le modalità di reclutamento dei ricercatori e di tutto il personale universitario, soprattutto in nome di una ricerca che riesca finalmente ad appagare anche interiormente lo studioso stesso. Di qui la necessità di recuperare il patrimonio materiale scolastico della comunità nazionale e soprattutto la memoria di un Paese che, soprattutto attraverso la scuola e le istituzioni educative, ha ancora tanto da raccontare e svelare. L'intervento di Antonella Cagnolati ha poi posto il proprio *focus* sulle sfide legate all'internazionalizzazione, sul sempre più diffuso *open access*, sulle nuove forme di diffusione della produzione scientifica e sulla stringente classificazione delle riviste, mettendo in luce problematiche e debolezze di un sistema che anche a livello internazionale sta rischiando di implodere e rispetto al quale la comunità accademica italiana è invitata ad assumere una posizione non di debolezza ma di costruttiva e dignitosa partecipazione. Mirella D'Ascenzo, con tono provocatorio, ha quindi presentato il necrologio della monografia, tipologia di pubblicazione, che pur appartenendo a una tradizione italiana di valore, risulta oggi sempre più accantonata dai docenti universitari, chiamati a soddisfare una serie di adempimenti impellenti di vario genere che non lasciano più il tempo per una vera riflessione storiografica della quale, al contrario, si gioverebbe l'intero mondo universitario ad ogni livello. Carla Callegari si è soffermata invece sull'importanza per la comunità di storici dell'educazione di favorire lo sviluppo di un numero crescente di studi di carattere comparativo e implementare così le linee di ricerca, obiettivi raggiungibili soprattutto creando una vera e propria rete scientifica di storici comparativisti capace di rispondere in maniera concreta alle richieste e alle sollecitazioni provenienti dalle più prestigiose storiografie occidentali. La stessa Callegari ha poi letto l'intervento di Giuseppe Zago (assente al workshop per

motivi istituzionali) che ha incentrato la propria analisi sul rapporto sempre più complesso tra ricerca e didattica, con l'obiettivo di comprendere fino in fondo quali siano attualmente le priorità del mondo docente ma anche quelle del mondo studentesco che costituisce ormai, a pieno titolo, una parte estremamente rilevante della comunità universitaria. A giudizio di Carla Ghizzoni (Università Cattolica del Sacro Cuore di Milano) il punto da cui partire per uscire da una situazione che, di fatto, non aiuta la crescita della comunità accademica ma anzi la penalizza notevolmente, è proprio la presa di coscienza da parte dell'intero settore M-Ped 02 di cosa non stia funzionando e di quali correttivi sia necessario apportare al più presto e su più fronti. In tale ottica il workshop maceratese può rappresentare l'occasione per mostrare la vitalità di un settore disciplinare troppo spesso dimenticato e che invece è pronto a rimettere al centro la vera ricerca nel nome di una logica di lavoro collaborativo, così cruciale negli scenari attuali, nazionali e internazionali. A prendere la parola è stata poi Tiziana Pironi, presidente del CIRSE, la quale, rifiutando categoricamente la logica degli adempimenti, ha invitato i relatori e gli uditori presenti a interrogarsi su quei processi di cambiamento così veloci e sovrastanti che hanno animato le recenti logiche ministeriali spesso non sempre coerenti e corrette e, nel contempo, a tentare di conferire alla propria attività di ricerca una progettualità di ampio respiro. A giudizio della Pironi, tale riflessione permetterà alla comunità accademica di trovare le giuste soluzioni per uscire dall'attuale *impasse*, soluzioni tra cui proprio la collaborazione con le società straniere del settore e l'investimento concreto su giovani di valore potrebbero rappresentare i primi giusti antidoti all'attuale crisi. Anche Brunella Serpe ha evidenziato come le innumerevoli incombenze ministeriali penalizzino in maniera eccessiva il lavoro dello studioso, al punto da modificare letteralmente il DNA proprio dello storico. Proprio per questo appare necessaria ed imprescindibile una risposta concreta, univoca e coesa da parte dei ricercatori del settore storico-pedagogico al fine di impedire che ne sia cancellata l'identità stessa. Per la Serpe, inoltre, sarà importante ridefinire il concetto d'internazionalizzazione, termine oggi sempre più invocato, ma che deve essere inteso come un vero e proprio incontro fruttuoso tra metodologie e culture scientifiche diverse e non omologazione o peggio colonizzazione di una comunità nazionale rispetto a un'altra. Luana Salvarani ha invece sottolineato come il contesto di ricerca delineato dai criteri di valutazione Anvur (per quanto discutibili) costituisca, come ogni condizione materiale, un presupposto e assieme un'opportunità, nel caso specifico per rinnovare e rafforzare la ricerca storico-pedagogica. Ad esempio, nel campo dei *Renaissance Studies* il confronto con la ricerca internazionale consente l'affinamento costante degli strumenti d'indagine, grazie al continuo dialogo con la storia generale, la storia delle istituzioni politiche e delle riforme religiose; come anche con la filologia, che fornisce strumenti indispensabili per la decodifica e la trascrizione delle fonti storico-pedagogiche più antiche. L'acquisizione di competenze attinte dall'intera area umanistica consentirà

altresì di valorizzare forme di ricerca come l'edizione critica, mezzo indispensabile per la restituzione di fonti indispensabili per la ricostruzione del pensiero educativo del passato, o la traduzione commentata di classici non più disponibili in edizioni moderne. Per Gianfranco Bandini, infine, i principali problemi presenti in ambito storico-pedagogici sono da intendersi quali problemi comuni all'intera pedagogia italiana. Proprio per questo è necessario l'accantonamento di frazionamenti, lotte ideologiche e sterili campanilismi che impedirebbero di perseguire obiettivi comuni. Al contrario, attraverso progetti e strategie condivise, sarà possibile recuperare il terreno perduto. Di qui la necessità di insistere su settori dimenticati o ambiti poco o scarsamente coltivati (come la storia delle minoranze educative e pedagogiche), di stabilire contatti con associazioni all'apparenza anche distanti per ambiti di ricerca, di lavorare sulla storia digitale e di conseguenza, riflettere anche sul ruolo che gli storici hanno come formatori.

A concludere l'intenso incontro di studi maceratese il pomeriggio della seconda giornata interamente dedicato alla creazione di uno stretto rapporto di collaborazione tra la comunità accademica italiana e quello ibero-americana e brasiliana. Nella prima parte sono state Franciele Ferreira França (UFPR Brasil) e Carolina Ribeiro Cardoso Da Silva (UDESC Brasil) a presentare un interessante e dettagliato resoconto (*Le tesi di dottorato brasiliane dedicate alla cultura materiale della scuola*) dei lavori di ricerca prodotti negli ultimi anni dai giovani studiosi nel corso del loro percorso di studi dottorali sul tema della cultura materiale della scuola, ambito di ricerca sempre più meritevole di specifiche attenzioni. A seguire la presentazione del volume curato da Vera Lucia Gaspar Da Silva, Gizele De Souza e César Augusto Castro, dal titolo *Cultura Material Escolar em Perspectiva Histórica: escritas e possibilidades* (Vitória, EDUFES/SBHE, in uscita per il 2018). Quattordicesimo volume della collana «Coleção Horizonte da Pesquisa em História da Educação» pubblicata dalla EDUFES (Editore da Universidade Federal do Espírito Santo) in collaborazione con la Società brasiliana di storia dell'educazione, il testo si presenta come un volume dal respiro realmente internazionale – come sottolineato dalle due relatrici e co-curatrici Vera Gaspar e Gizele De Souza – poiché raccoglie e mette a confronto tradizioni e prospettive di ricerca non solo proprie della comunità scientifica brasiliana ma anche di altri paesi dell'America Latina (Messico, Uruguay) e dell'Europa (Spagna, Gran Bretagna, Italia).

A chiusura dei lavori, si è svolta una fruttuosa riunione di lavoro aperta a tutti gli studiosi partecipanti al convegno e finalizzata alla costruzione di un progetto nazionale brasiliano (CNPq) e/o internazionale (ERASMUS+ 2014-2020) avente come focus di ricerca la produzione, l'uso e la circolazione di arredi scolastici e sussidi didattici tra Europa e America Latina tra '800 e '900. Una tematica che promette sempre più di produrre interessanti risultati nell'avanzamento della disciplina storico-educativa, nello sviluppo di una ricerca realmente internazionale poiché basata su filoni effettivamente storico-

comparativi, infine in una valorizzazione ancora più completa delle collezioni del patrimonio storico-educativo conservato nei musei, nelle scuole e nei centri di ricerca sulla memoria della scuola dei paesi coinvolti.

La recente costituzione della Società Italiana per lo studio del Patrimonio Storico-Educativo (SIPSE)

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The recent establishment of the Italian Society for the study of Historical-Educational Heritage (SIPSE)

ABSTRACT: During the III «International Conference on School Material Culture», *Production, Use and Circulation of School Furnishings and Teaching Aids between Europe and Latin America in XIX and XX Centuries*, which was held in Macerata in the days 12-13 September 2017, the SIPSE-Italian Society for the study of Historical-Educational Heritage was officially established. Following the model of the *Sociedad Española para el Estudio del Patrimonio Histórico-Educativo* (SEPHE) and of similar societies existing in other countries as well, the SIPSE targets several goals – as by its Statute, which is here reproduced. The main objects of the society are: to take a census and protect the Italian educational heritage; to promote research focused on this heritage and, at the same time, to form a new generation of historians specialised in the field and finally to foster and disseminate the knowledge of such heritage through specific educational and cultural initiatives, which imply a strong cooperation with the Italian centre for the historical educational research (CIRSE), with the universities who signed the Statute, with the schools and with the museums engaged in preserving and promoting the Italian «widespread heritage of school and education».

EET/TEE KEYWORDS: History of Education; Educational Heritage; Historical Research; Scientific Associations; Conference; Italy; XXth Century.

In occasione della III «International Conference on School Material Culture», dal titolo *Production, Use and Circulation of School Furnishings and Teaching Aids between Europe and Latin America in XIX and XX Centuries*, svoltasi

a Macerata nei giorni 12 e 13 settembre 2017, si è costituita ufficialmente la *Società Italiana per lo studio del Patrimonio Storico-Educativo* (SIPSE), la quale, sul modello della *Sociedad Española para el Estudio del Patrimonio Histórico-Educativo* (SEPHE) e degli analoghi sodalizi scientifici sorti in questi ultimi anni in Portogallo, Francia, Regno Unito, Grecia, Argentina, Cile e Brasile si prefigge principalmente di promuovere gli studi e le ricerche sul patrimonio storico-educativo e scolastico della penisola e di formare una nuova generazione di giovani ricercatori e specialisti del settore.

La neonata società scientifica annovera tra i soci fondatori le unità di ricerca di storia dell'educazione e della scuola operanti nell'ambito di una dozzina di atenei italiani, i quali già dispongono di musei della scuola, della didattica e dell'educazione e/o di archivi, laboratori e centri di documentazione e ricerca dedicati proprio al patrimonio storico-educativo e scolastico. Tra i soci fondatori figurano, infatti, le università di Bari, Basilicata, Bologna, Bolzano, Calabria, Firenze, Foggia, Macerata, Milano Cattolica, Molise, Padova e Roma Tre.

Come si evince dall'art. 3 dello Statuto appena approvato, le principali finalità del sodalizio sono:

- a. Protezione, conservazione e valorizzazione del patrimonio storico-educativo, allocato presso musei dell'educazione, centri di documentazione e ricerca sul patrimonio storico-educativo, scuole storiche e più in generale negli istituti scolastici di ogni ordine e grado;
- b. promozione di poli periferici di censimento, raccolta e catalogazione di tale patrimonio;
- c. tutela del patrimonio storico-educativo nazionale (sia esso di natura biblioteconomica, archivistica, architettonica o museale), promuovendo iniziative atte a evitarne la dispersione e il deterioramento – anche attraverso l'opportuna segnalazione alle competenti autorità;
- d. elaborazione di specifici protocolli di conservazione del patrimonio culturale delle scuole, definendone criteri catalografici e predisponendo linee guida e strumenti di corredo da distribuire negli istituti scolastici di ogni ordine e grado;
- e. sviluppo dell'interesse del mondo scolastico e più in generale della società civile nei confronti dei beni culturali della scuola, evidenziandone le funzioni didattiche e divulgative;
- f. promozione di intese fra le diverse istituzioni aderenti al fine di facilitare scambi di informazioni, pratiche ed esperienze, nonché l'elaborazione di programmi comuni e regolamenti condivisi;
- g. creazione di collegamenti con similari associazioni estere.

A Macerata, oltre a sottoscrivere l'Atto costitutivo della società scientifica e ad approvare lo Statuto, i soci fondatori hanno eletto il Comitato organizzatore del nuovo sodalizio, il quale è incaricato di procedere alla vera e propria attivazione del nuovo sodalizio, mettendo a punto e approvando, nell'arco di un anno, il Regolamento attuativo, avviando le procedure per l'elezione

degli organi di governo e di rappresentanza, e, infine, organizzando il primo seminario di studi a carattere internazionale della S.I.P.S.E.

Tale Comitato organizzatore, costituito da dodici componenti effettivi designati dai rispettivi atenei più un segretario senza diritto di voto, annovera tra i suoi membri: *Anna Ascenzi* (Università degli Studi di Macerata) che riveste la carica di presidente, *Carmela Covato* (Università degli Studi Roma Tre) che riveste la carica di vicepresidente, *Vittoria Bosna* (Università di Bari), *Michela D'Alessio* (Università della Basilicata), *Mirella D'Ascenzo* (Università di Bologna), *Annemarie Augschöll* (Libera Università di Bolzano), *Brunella Serpe* (Università della Calabria), *Gianfranco Bandini* (Università di Firenze), *Antonella Cagnolati* (Università di Foggia), *Carla Ghizzoni* (Università Cattolica di Milano), *Alberto Barausse* (Università del Molise), *Giuseppe Zago* (Università di Padova); infine, *Juri Meda* (Università degli Studi di Macerata) che riveste la carica di segretario.

Appendice

STATUTO SOCIETÀ ITALIANA PER LO STUDIO DEL PATRIMONIO STORICO- EDUCATIVO (S.I.P.S.E.)

TITOLO I *Disposizioni generali*

Articolo 1 *Denominazione e sede*

1. Si costituisce, ai sensi degli artt. 36 ss. C.C., l'associazione denominata: «*Società Italiana per lo studio del Patrimonio Storico-Educativo* – SIPSE (da ora in avanti denominata «Società»)» con sede in Macerata, presso il Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo dell'Università degli Studi di Macerata, Piazzale Luigi Bertelli, n. 1 – Contrada Vallebona, 621000 Macerata (Italia). Il trasferimento della sede legale potrà essere deliberato dall'Assemblea generale della Società.
2. La modifica del domicilio della Società non comporta modifica statutaria ma solo l'obbligo di comunicazione agli uffici competenti.

Articolo 2 *Durata*

La Società è costituita a tempo indeterminato e potrà essere disciolta solo per delibera assunta all'unanimità dall'Assemblea generale straordinaria.

Articolo 3 *Finalità*

1. La Società è apartitica, non ha scopo di lucro e svolge attività di promozione e utilità sociale.
2. Le principali finalità della società sono le seguenti:
 - a. protezione, conservazione e valorizzazione del patrimonio storico-educativo, allocato presso musei dell'educazione, centri di documentazione e ricerca sul patrimonio storico-educativo, scuole storiche e più in generale negli istituti scolastici di ogni ordine e grado;
 - b. promozione di poli periferici di censimento, raccolta e catalogazione di tale patrimonio;
 - c. tutela del patrimonio storico-educativo nazionale (sia esso di natura biblioteconomica, archivistica, architettonica o museale), promuovendo iniziative atte a evitarne la dispersione e il deterioramento – anche attraverso l'opportuna segnalazione alle competenti autorità;
 - d. elaborazione di specifici protocolli di conservazione del patrimonio culturale delle scuole, definendone criteri catalografici e predisponendo linee guida e strumenti di corredo da distribuire negli istituti scolastici di ogni ordine e grado;
 - e. sviluppo dell'interesse del mondo scolastico e più in generale della società civile nei confronti dei beni culturali della scuola, evidenziandone le funzioni didattiche e divulgative;
 - f. promozione di intese fra le diverse istituzioni aderenti al fine di facilitare scambi di

- informazioni, pratiche ed esperienze, nonché l'elaborazione di programmi comuni e regolamenti condivisi;
- g. creazione di collegamenti con similari associazioni estere.

Articolo 4

Attività

La Società si propone di promuovere le seguenti attività, al fine di realizzare le proprie finalità:

- a. organizzazione di eventi e iniziative scientifiche nazionali e internazionali (congressi, seminari, giornate di studio, progetti di ricerca) nell'ambito dello studio del patrimonio storico-educativo;
- b. redazione di pubblicazioni scientifiche e/o divulgative di rilevante interesse locale, nazionale e/o internazionale;
- c. partecipazione alle iniziative scientifiche promosse da società analoghe a livello nazionale e internazionale;
- d. promozione di specifici percorsi di formazione professionale indirizzati ai curatori e conservatori museali specializzati nella gestione e nella manutenzione di raccolte storiche di carattere educativo, nonché alle guide museali;
- e. promozione di specifici percorsi di formazione degli insegnanti nell'ambito della didattica della storia e dell'educazione al patrimonio storico-educativo.

TITOLO II

Membri della società

Articolo 5

Soci

La Società prevede quattro tipologie di soci:

- a. soci fondatori
- b. soci istituzionali
- c. soci individuali
- d. soci onorari

Sono *soci fondatori* le persone fisiche sottoscrittrici del presente Statuto in rappresentanza delle unità di ricerca attive sul territorio nazionale nello studio del patrimonio storico-educativo.

Sono *soci istituzionali* i musei dell'educazione (siano essi universitari o promossi da altre istituzioni e/o associazioni private), i centri di documentazione e ricerca sul patrimonio storico-educativo, le scuole storiche e gli istituti scolastici di ogni ordine e grado in possesso di archivi, biblioteche, musei scolastici e/o gabinetti scientifici di rilevante interesse storico.

Sono *soci individuali* i ricercatori e gli studiosi del patrimonio storico-educativo.

Sono *soci onorari* quelle persone fisiche o giuridiche che, per le loro qualità personali e per l'eccellenza del loro contributo culturale e scientifico, siano designati all'unanimità dal Consiglio direttivo della Società.

I soci istituzionali saranno tenuti a nominare una persona fisica che li rappresenti all'interno della società.

Assumono la qualifica di *soci titolari* della Società i soci fondatori, i soci istituzionali e i soci individuali.

Articolo 6

Ammissione di soci

1. Sono ammesse all'Associazione tutte le persone fisiche che ne condividono gli scopi e accettano il presente statuto e l'eventuale regolamento attuativo interno.

2. L'organo competente a deliberare sulle domande di ammissione è l'Assemblea la quale deciderà a maggioranza.
3. Il richiedente, nella domanda di ammissione dovrà specificare le proprie complete generalità impegnandosi a versare la quota associativa.
4. Potranno entrare a far parte della Società, in qualità di *soci individuali*, i ricercatori, gli studiosi e i conservatori del patrimonio storico-educativo che desiderino collaborare con la stessa, purché in possesso degli adeguati requisiti scientifici a giudizio insindacabile della maggioranza del Consiglio direttivo. Tali soci dovranno avanzare formale richiesta di iscrizione alla Società allegando un breve *curriculum vitae* e due lettere di presentazione redatte da membri della società.
5. Allo stesso modo potranno entrare a far parte della Società, in qualità di *soci istituzionali*, i soggetti di cui all'articolo 5 del presente Statuto, purché siano in possesso degli adeguati requisiti scientifici a giudizio della maggioranza del Consiglio direttivo.
6. Tali soci dovranno avanzare formale richiesta di iscrizione alla Società allegando un breve memoriale di presentazione della propria istituzione e il *curriculum vitae* della persona che la andrà a rappresentare.
 - a. L'ammissione a socio è a tempo indeterminato, fermo restando il diritto di recesso.
 - b. L'associazione prevede l'intrasmissibilità della quota o contributo associativo ad eccezione dei trasferimenti a causa di morte e la non rivalutabilità della stessa.

Articolo 7

Recesso ed esclusione del socio

1. Il socio, in qualsiasi momento, può recedere dall'associazione mediante comunicazione scritta al Consiglio direttivo della Società, fatto salvo per il dimissionario l'adempimento degli obblighi pendenti nei confronti della società.
2. Rappresentano cause di esclusione dalla Società:
 - a. inadempienze gravi e reiterate da parte del socio degli obblighi sociali figuranti nel presente Statuto e/o derivanti da successive deliberazioni del Consiglio direttivo e dell'Assemblea generale;
 - b. mancato versamento delle quote sociali corrispondenti per due anni consecutivi;
 - c. compimento intenzionale da parte del socio di azioni oltraggiose nei confronti degli organi di governo e di rappresentanza della Società e/o lesive della dignità personale e della reputazione scientifica degli altri soci.
1. L'esclusione è deliberata dal Consiglio Direttivo con voto segreto e dopo avere ascoltato le giustificazioni dell'interessato

Articolo 8

Diritti dei soci

1. I soci fondatori, individuali e i rappresentanti dei soci istituzionali avranno i seguenti diritti:
 - a. partecipare alle attività culturali e scientifiche promosse o patrocinate dalla Società;
 - b. avanzare proposte e suggerimenti per lo sviluppo della Società stessa e per il conseguimento delle sue finalità statutarie;
 - c. usufruire di tutti i vantaggi e benefici derivanti dalla sua condizione di socio;
 - d. partecipare all'Assemblea generale della Società con diritto di voto;
 - e. poter esprimere il proprio voto ed essere eleggibile all'interno delle cariche direttive;
 - f. ricevere informazioni in merito alla composizione degli organi di governo e di rappresentanza, sulle deliberazioni assunte dagli organi direttivi, sulle attività culturali e scientifiche promosse dalla Società e sullo stato economico della stessa;
 - g. uscire volontariamente dalla Società in qualunque momento.

I soci onorari godranno dei medesimi diritti degli altri soci, ad eccezione di quanto disposto dai punti “d” ed “e” del comma 1 del presente articolo. Potranno tuttavia assistere all’Assemblea generale senza diritto di voto.

Articolo 9

Diritti e doveri dei soci

1. I soci fondatori, quelli individuali e i rappresentanti dei soci istituzionali hanno il dovere di eleggere gli organi sociali e di essere eletti negli stessi.

Essi hanno diritto di essere informati sulle attività dell’associazione e di essere rimborsati per le spese effettivamente sostenute nello svolgimento dell’attività prestata.

I soci devono versare nei termini la quota sociale e rispettare il presente statuto e l’eventuale regolamento interno.

Gli aderenti svolgeranno la propria attività nell’associazione prevalentemente in modo personale, volontario e gratuito, senza fini di lucro, anche indiretto, in ragione delle disponibilità personali.

I soci fondatori, individuali e i rappresentanti dei soci istituzionali saranno altresì gravati dai seguenti obblighi:

- a. accettare nella sua totalità il contenuto del presente Statuto e le deliberazioni assunte dagli organi di governo e di rappresentanza della Società;
 - b. condividere le finalità della Società e collaborare al loro conseguimento;
 - c. partecipare alle adunanze dell’Assemblea generale;
 - d. adempiere agli obblighi inerenti la carica da esso eventualmente occupata all’interno degli organi di governo e di rappresentanza della Società;
 - e. non realizzare o promuovere attività contrarie alle finalità sociali, né sfruttare la condizione di socio per compiere atti speculativi o contrari alla legge;
 - f. provvedere con regolarità al pagamento delle quote sociali, in base alle modalità e conformemente alle quantità determinate dal Consiglio direttivo.
2. I soci onorari saranno gravati dai medesimi obblighi degli altri soci, ad eccezione di quanto disposto dal punto “f” del comma 1 del presente articolo.

TITOLO III

Organi di governo e di rappresentanza

Articolo 10

Criteri di funzionamento

La Società si reggerà nel suo funzionamento sulla base di quanto disposto all’interno del presente Statuto. Tanto la sua organizzazione quanto il suo funzionamento si atterranno ai principi democratici e rispetterà in ogni caso il pluralismo interno.

Articolo 11

Tipologie di organi

Gli organi di governo e di rappresentanza della Società sono i seguenti:

- a. Organi collegiali: Assemblea generale, Consiglio direttivo, Comitato organizzatore
- b. Organi personali: Presidente, Vice-presidente, Segretario e Tesoriere

Capitolo I

Organi collegiali

Sezione I

Assemblea generale

Articolo 12
Composizione

L'Assemblea generale, organo sovrano di governo della Società, è composta da tutti i soci fondatori, individuali e istituzionali in regola con i pagamenti delle quote sociali.

Articolo 13
Regime delle adunanze

Le adunanze dell'Assemblea generale si dividono in ordinarie e straordinarie:

- a. L'Assemblea generale si riunirà in forma ordinaria una volta l'anno;
- b. L'Assemblea generale si riunirà in forma straordinaria qualora il Consiglio direttivo lo deliberi all'unanimità o qualora sia richiesto per iscritto da almeno 1/3 dei soci.

Articolo 14
Convocazione e funzionamento dell'Assemblea

1. L'Assemblea generale è convocata dal Presidente del Consiglio direttivo, o di chi ne fa le veci, a mezzo posta elettronica. Nella comunicazione saranno indicati luogo, data e orario della riunione dell'Assemblea generale, così come l'ordine del giorno della stessa. Tra la convocazione e la data indicata per lo svolgimento dell'Assemblea generale dovrà esserci un intervallo temporale non inferiore a 15 giorni per le convocazioni ordinarie e 7 giorni per quelle straordinarie. Gli organi di rappresentanza non sono da ritenersi in alcun modo responsabili del mancato recapito della convocazione di cui sopra qualora essa dipenda dalla mancata comunicazione da parte del socio di eventuali modifiche dell'indirizzo di posta elettronica indicato al momento dell'iscrizione.
2. Le Assemblee generali della Società saranno da ritenersi regolarmente costituite e quindi aventi funzioni deliberative quando partecipino ad esse – o siano regolarmente rappresentati a mezzo delega – la metà più uno degli aventi diritto al voto.
3. L'Assemblea generale sarà presieduta dal Presidente del Consiglio direttivo.
4. Le discussioni e le deliberazioni dell'assemblea sono riassunte in un verbale redatto dal segretario e sottoscritto dal presidente.
5. Ogni socio ha diritto di consultare il verbale e di trarne copia.

Articolo 15
Costituzione dell'Assemblea generale

Tutti i soci titolari sono per diritto membri dell'Assemblea generale.

Articolo 16
Attribuzioni all'Assemblea generale ordinaria

L'Assemblea generale ordinaria avrà le seguenti attribuzioni:

- a. esaminare e approvare il bilancio consuntivo annuale approntato dal Tesoriere;
- b. esaminare e approvare il bilancio preventivo relativo all'esercizio finanziario dell'anno successivo approntato dal Tesorier e proposto dal Consiglio direttivo;
- c. esaminare e approvare il piano delle attività culturali e scientifiche relative all'anno successivo proposto dal Consiglio direttivo;
- d. elezione e nomina del Consiglio direttivo e suo rinnovo.

Articolo 17
Attribuzioni all'Assemblea generale straordinaria

L'Assemblea generale straordinaria avrà le seguenti attribuzioni:

- a. approvare e modificare lo Statuto e il regolamento attuativo, se necessario;
- b. sciogliere la Società;
- c. qualsiasi altro punto proposto all'ordine del giorno dal Consiglio direttivo, qualora esso non rientri tra le pertinenze degli altri organi di governo e di rappresentanza della Società.

Articolo 18

Adozione delle deliberazioni

1. Le deliberazioni delle Assemblee generali sono adottate in base al principio maggioritario. In caso di parità il Presidente, o chi ne faccia le veci, potrà esprimere una seconda preferenza. In ogni caso, per validare le deliberazioni dell'Assemblea generale straordinaria saranno necessari i 2/3 dei soci presenti. Potranno votare tutti i soci titolari presenti alle Assemblee generali o i soci che abbiano delegato per iscritto altri soci in regola con il versamento delle quote associative.

Validità delle Assemblee

1. L'assemblea ordinaria è regolarmente costituita in prima convocazione se è presente la maggioranza degli iscritti aventi diritto di voto; in seconda convocazione, da tenersi anche nello stesso giorno, qualunque sia il numero dei presenti, in proprio o in delega.
2. Ciascun socio potrà ricevere al massimo tre deleghe; alle deleghe dovrà essere allegata copia di un documento d'identità del delegante in corso di validità, debitamente firmato.
3. Le deliberazioni dell'assemblea ordinaria vengono prese a maggioranza dei presenti e rappresentati per delega, sono espresse con voto palese tranne quelle riguardanti le persone e la qualità delle persone (o quando l'Assemblea lo ritenga opportuno).
4. In caso di parità il Presidente, o chi ne faccia le veci, potrà esprimere una seconda preferenza.
5. L'assemblea straordinaria delibera a maggioranza di 2/3 dei soci presenti, purché in regola con il versamento delle quote associative.

Sezione II

Consiglio direttivo

Articolo 19

Composizione

1. La rappresentanza della Società è affidata al Consiglio direttivo il quale gestisce gli interessi della Società in conformità alle direttive dell'Assemblea generale. Esso è composto dal Presidente, dal Vice-presidente, dal Segretario, dal Tesoriere e da sei membri aggiuntivi.
2. Per far parte del Consiglio direttivo sono considerati requisiti indispensabili risultare in pieno godimento dei diritti civili e non trovarsi nelle condizioni di incompatibilità previsti dalla legislazione vigente.
3. I membri che compongono il Consiglio direttivo svolgeranno le proprie funzioni in forma gratuita.

Articolo 20

Regime delle adunanze

Il Consiglio direttivo si riunirà almeno una volta l'anno, sempre che lo consideri necessario il Presidente o su richiesta di almeno cinque dei suoi componenti.

Articolo 21

Convocazione e funzionamento del Consiglio direttivo

1. La convocazione del Consiglio direttivo sarà fatta dal Presidente del Consiglio direttivo a mezzo posta elettronica. Nella comunicazione saranno indicati luogo, data e orario della riunione, così come l'ordine del giorno della stessa. Tra la convocazione e la data indicata per lo svolgimento della riunione dovrà esserci un intervallo temporale di almeno 15 giorni. Il Presidente non è da ritenersi in alcun modo responsabile del mancato recapito della convocazione di cui sopra qualora essa dipenda dalla mancata comunicazione

da parte del socio di eventuali modifiche dell'indirizzo di posta elettronica indicato al momento dell'iscrizione. Il Consiglio direttivo sarà da ritenersi regolarmente costituito quando vi siano presenti, o regolarmente rappresentati a mezzo delega, la maggioranza dei suoi membri (sei membri). Delle riunioni del Consiglio direttivo sarà redatto un regolare verbale sottoscritto dal Presidente e dal segretario e inviato, per l'approvazione, entro 7 giorni dalla sua stesura, a mezzo posta elettronica, a tutti i membri del Consiglio direttivo.

Il Consiglio direttivo potrà delegare parte delle sue facoltà anche a soci esterni al Consiglio, qualora in possesso di specifici requisiti richiesti dalle mansioni ad essi affidate.

Articolo 22

Costituzione del Consiglio direttivo e procedure elettive

I membri del Consiglio direttivo saranno eletti dall'Assemblea generale mediante candidature spontanee presentate al Presidente uscente entro 30 giorni dalla data delle elezioni. Risulteranno eletti i dieci candidati che avranno raccolto il maggior numero di voti, fermo restando che almeno cinque di questi dovranno appartenere alle unità di ricerca attive sul territorio nazionale nello studio del patrimonio storico-educativo, che hanno espresso i soci fondatori.

Articolo 23

Durata dell'incarico

Il Consiglio direttivo è rinnovato ogni quattro anni e i suoi membri potranno essere rieletti per un solo ulteriore mandato.

Articolo 24

Attribuzioni del Consiglio direttivo

È competenza del Consiglio direttivo:

- a. programmare le attività sociali e dirigere la gestione economico-amministrativa della Società, conformemente alle proprie finalità;
- b. dare esecuzione alle deliberazioni dell'Assemblea generale;
- c. elaborare e sottoporre all'approvazione dell'Assemblea generale i bilanci consuntivi e preventivi;
- d. sottoporre all'approvazione dell'Assemblea generale il piano delle attività culturali e scientifiche della Società;
- e. nominare i soci onorari;
- f. fissare e aggiornare le quote sociali annuali;
- g. accettare, a nome della Società, donazioni, eredità, lasciti e legati a titolo gratuito;
- h. contrattare qualsiasi atto di acquisizione a titolo oneroso;
- i. ordinare pagamenti e assumere oneri legati all'attività scientifica della Società;
- j. contrattare e licenziare eventuali collaboratori esterni e fissare la loro remunerazione.

Articolo 25

Adozione delle deliberazioni

Le deliberazioni del Consiglio direttivo saranno adottate con la maggioranza semplice dei voti. In caso di parità il Presidente, o chi ne faccia le veci, potrà esprimere una seconda preferenza.

Sezione III Comitato organizzatore

Articolo 26 *Funzioni*

Il Comitato organizzatore è un organo di rappresentanza transitoria, eletto dai soci fondatori al momento della sottoscrizione dell'atto costitutivo della Società, il quale svolgerà temporaneamente le funzioni assegnate al Consiglio direttivo in base a quanto stabilito dall'articolo 25 della Sezione II del presente capitolo e il cui funzionamento sarà regolato da quanto disposto dall'articolo 26 della Sezione II del presente Statuto. Il Comitato organizzatore è costituito da dodici componenti (Presidente, Vice-presidente e ulteriori dieci membri aggiuntivi) e da un segretario senza diritto di voto nominato il giorno stesso della costituzione del Comitato organizzatore.

Capitolo II Organi personali

Articolo 27 *Procedure elettive*

Gli organi personali (Presidente, Vice-presidente, Segretario, Tesoriere) sono eletti in seno al Consiglio direttivo nel corso della sua prima adunanza in base al principio maggioritario.

Articolo 28 *Attribuzioni del Presidente*

Il Presidente del Consiglio direttivo assume la rappresentanza legale dello stesso con facoltà di delega e ad esso pertengono le seguenti attribuzioni:

1. rappresentare legalmente la Società in tutti gli atti pubblici e privati e di fronte ad ogni tipo di istituzione;
2. convocare, presiedere e chiudere le adunanze delle Assemblee generali e del Consiglio direttivo;
3. stabilire l'ordine del giorno delle adunanze delle Assemblee generali e del Consiglio direttivo;
4. dare seguito alle deliberazioni assunte dalle Assemblee generali e dal Consiglio direttivo;
5. ordinare i pagamenti regolarmente deliberati;
6. autorizzare con la sua firma le nomine, gli atti e le attestazioni e qualsiasi altro documento che si renda necessario per la vita della Società;
7. affrontare, in caso di urgenza, le questioni impellenti che siano di competenza del Consiglio direttivo, al quale dovrà necessariamente comunque rendere conto alla prima adunanza utile;
8. qualunque altra competenza non esplicitamente assegnata al Consiglio direttivo.

Articolo 29 *Attribuzioni del Vice-presidente*

Assisterà nelle sue funzioni il Presidente, sostituendolo inoltre in caso di assenza, malattia o dimissioni.

In caso di assenza, malattia o dimissioni del Vice-presidente, egli potrà essere sostituito provvisoriamente dal membro anagraficamente più anziano del Consiglio direttivo.

Articolo 30 *Attribuzioni del Segretario*

Sono di competenza del Segretario le seguenti funzioni:

- a. fungere come tale nelle riunioni delle assemblee generali e del Consiglio direttivo

- redigendo i verbali delle medesime e attestando quanto deliberato;
- b. gestire e custodire la documentazione della Società e mantenerne in ordine l'archivio;
 - c. redigere le attestazioni richieste alla Società e tenerne un registro;
 - d. gestire la corrispondenza della Società in accordo con il Presidente;
 - e. assistere il Presidente nella determinazione dell'ordine del giorno delle assemblee e delle riunioni del Consiglio direttivo;
 - f. ricevere e trasmettere agli organi competenti le richieste di ammissione dei soci;
 - g. svolgere le pratiche amministrative necessarie alla gestione della Società.

Articolo 31

Attribuzioni del Tesoriere

Sono di competenza del Tesoriere le seguenti funzioni:

- a. gestire la contabilità della società;
- b. tenere il conto delle entrate e delle uscite sociali, sovrintendendo in tutte le operazioni di natura finanziaria;
- c. raccogliere le quote sociali;
- d. custodire il patrimonio economico della Società, gestire il conto corrente della medesima e mantenere i rapporti con l'Istituto di credito presso il quale è stato attivato il conto.
- e. ottemperare agli ordini di pagamento indicati dal Presidente.
- f. redigere il bilancio consuntivo e preventivo della Società che dovrà essere presentato al Consiglio direttivo affinché esso lo sottoponga all'approvazione dell'Assemblea generale.

TITOLO IV

Regime economico

Articolo 32

Durata dell'esercizio finanziario

La chiusura dell'esercizio finanziario della Società è fissata improrogabilmente al 31 dicembre di ogni anno

Articolo 33

Patrimonio

La Società disporrà di un patrimonio proprio, essendone priva al momento della sua costituzione.

Le risorse economiche necessarie per perseguire le proprie finalità sociali saranno le seguenti:

- a. le quote sociali che saranno corrisposte dai soci secondo quanto indicato nel Regolamento attuativo della Società e le modifiche eventualmente introdotte dall'Assemblea
- b. le donazioni volontarie dei soci;
- c. eventuali lasciti e donazioni di terzi;
- d. introiti derivanti da attività ed iniziative scientifiche organizzate dalla Società e rientranti nell'ambito dei propri fini statutari.

Articolo 34

Amministrazione del patrimonio

L'amministrazione del patrimonio della Società sarà gestita dal Consiglio direttivo per il tramite del Tesoriere; ad essa si dovrà dare la pubblicità sufficiente affinché i soci possano essere al corrente della destinazione dello stesso.

TITOLO V Modificazione dello Statuto

Articolo 35 *Modificazione dello Statuto*

1. La modificazione dello Statuto richiederà un'apposita delibera dell'Assemblea generale straordinaria convocata specificatamente a tale scopo.
2. Le modificazioni allo Statuto entreranno in corso di validità per i soci a partire dal momento della loro adozione, secondo la procedura prevista dalla legislazione vigente in materia.

TITOLO VI Scioglimento della Società

Articolo 36 *Cause*

La Società si scioglie:

- a. Per volontà di tutti i soci;
- b. Quando viene a mancare la pluralità dei soci, se nel termine di sei mesi questa non è ricostituita.

Art. 37 *Devoluzione dei beni*

In caso di scioglimento della Società i beni della stessa saranno devoluti al C.I.R.S.E (Centro Italiano per la Ricerca Storico-Educativa).

Disposizioni finali

Articolo 37

Per quanto non esplicitamente previsto dal presente Statuto si rimanda ai contenuti del successivo Regolamento attuativo che sarà redatto entro un anno dalla costituzione della Società medesima e, in mancanza, alle disposizioni del Codice Civile vigenti in materia.

In Macerata, 13 settembre 2017

I soci fondatori della SIPSE

*International
Bibliography*



**Bibliografia
Internazionale**

International Bibliography of History of Education and Children's Literature (2016)*

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Introduction

The present overview *International Bibliography of the history of education and children's literature* about the year 2016 is the fifth of a serie, which has been published in 2013, 2014, 2015 and 2016 on the international journal «History of Education & Children's Literature» and concerned the seven years period 2010-2016; it was followed by the publication of fourth 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, educational sciences), as well as through the catalogues of almost 400 high specialized scientific reviews published in different countries of the world.

* 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.

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 (mainly) the year 2016, 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, Wuhan, China), Margot Hillel (Australian Catholic University, Australia), Rebekka Horlacher (redaction of the review «Bildungsgeschichte. International

Journal for the Historiography of Education», Switzerland), Esmeralda Hoti (Faculty Education/Department of Psychology, University of “Aleksander Moisiu”, Durres (Albania), Peter Kallaway (University of Cape Town, South Africa), Anu Kehman (Estonian Children’s Literature Centre, Tallinn), Iveta Kestere (University of Lettland), Librarian Staff of the Library K.D. Ushinsky (Russian Academy of Education, Moscow, Russia), Grigory Kornetov (Academy of the Social Administration, Moscow, Russia), Javier Laspalas (Universidad de Navarra, Spain), Manuel Martínez Neira (Universidad Carlos III de Madrid, Spain), Hugh Morrison (University of Otago, New Zealand), Gabriela Ossenbach Sauter (UNED, Spain), Paraskevi Pougariidou (University of Western Macedonia, Greece), Joaquim Pintassilgo (University of Lisbon, Portugal), Edvard Protner (University of Maribor, Slovenia), Paul J. Ramsey (Eastern Michigan University, Editor of the review «American Educational History Journal»), Rebecca Rogers (Université Paris Descartes, France), Vadim Rõuk (Tallinn University, Estonia), Alla A. Salnikova (Kazan State University, Russia), Joanna Schiller-Walicka (Redaction of the review «Rozprawy z Dziejów Owiaty», Poland), Evelina Scaglia (University of Bergamo, Italy), Juan Senís Fernández (University of Saragoza, Spain), Verónica Sierra Blas (Universidad de Alcalá, Spain), Larisa Smirnova (redaction of the review «Istoriko-Pedagogichesky Zhurnal», Russia), Wendelin Sroka (Reading Primers Special Interest Group of the International Society for Historical and Sistematic Research on Schoolbooks, Germany), Irena Stonkuvienė (Vilnius University, Lithuania), Claudia Tatasciore (Ph. D., University of Bologna), Natasa Vujscic Zivkovic (Department of Pedagogy, Faculty of philosophy, Universety of Belgrade, Serbia), Johannes Westberg (Uppsala University, Sweden), Cristina Yanes (Universidad de Sevilla, Spain), Christian Ydesen (Aalborg University, Denmark).

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» (Lithuania)
 AIPS = «Annali Istituto Paolo VI» (Italy)
 AJA = «Ajalooline Ajakiri/The Estonian Historical Journal» (Estonia)

- 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)
ARTS = «Arts 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 Polnischen Historischen 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)

- CAED = «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)
 CHICO = «Chinese College Teaching» (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)
 CONCE = «Contemporary College Education» (China)
 CONCHI = «Construction of Chinese Course» (China)
 CONFOLI = «Contemporary Foreign Literature» (China)
 CONLIF = «Contemporary Literary Forum» (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)
 DEVEC = «Development of Chinese Course» (China)
 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)
EDI = «Educazione interculturale» (Italy)
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» (Estonia)
EI = «Education Inquiry» (Sweden)
EJ = «Editor's Journal» (China)
EJE = «European Journal of Education» (USA)
EJPE = «Encyclopaideia. Journal of Phenomenology and Education» (Italy)
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)
 FLP = «CQIA Rivista – Formazione, Lavoro, Persona» (Italy)
 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. Sociologiya» (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)
 GUANS = «Guangxi Social Sciences» (China)
 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)
 HENAN = «Henan Social Science» (China)
 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)
 HUM = «Humanitas» (Italy)
 IAFOR = «IAFOR Journal of Education» (Japan)
 IC = «Italia Contemporanea» (Italy)
 IE = «Innovación Educativa» (Spain)
 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)
 IN = «Infanzia» (Italy)
 INJS = «Inostrannye Yazyki v Shkole» (Russia)
 INNOB = «Innovacii v obrazovanii» (Russia)
 INT = «Intellect» (China)
 INTEP = «International and European Politics» (Greece)
 INTER = «Interacções» (Portugal)
 IOL = «Innovacii v Obrazovanii i Lingvistike» (Russia)
 IPAV = «Istoriko-Pedagogichesky Almanakh VLADI» (Russia)
 IPZ = «Istoriko-Pedagogichesky Zhurnal» (Russia)
 IRAO = «Izvestya Rossyskoj Akademii Obrazovanya» (Russia)
 IRCL = «International Research in Children's Literature» (Canada)
 IRGPU = «Izvestya Rossyskogo Gosudarstvennogo Pedagogicheskogo Universiteta im. A.I. Gercena» (Russia)
 IRHED = «International Review of History Education» (Greece)
 ISBRA = «Iskusstvo i obrazovanie» (Russia)
 ISK = «Iskolakultura Könyvek» (Hungary)
 ISPESE = «Istorya pedagogiki segodnya» (Russia)
 ISSRA = «Issledovatel'skaya rabota shkol'nikov» (Russia)
 IST = «Istorija» (Lithuania)
 ISTOBA = «Istorichesko badeshte» (Bulgaria)

- ISTPAM = Istorya i istoricheskaya pamiat (Russia)
 ISTPE = «Istoriko-pedagogichesky Ezhegodnik» (Russia)
 IT = «δια-κειμενα - inter-textes» (Greece)
 ITALICA = «Italica Wratislaviensia» (Poland)
 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 Childhood 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)» (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)
JOUCHI = «Journal of Chinese Contemporary Literature» (China)
JOUCS = «Journal of Curriculum Studies» (United Kingdom)
JOUEC = «Journal of Education in China» (China)
JOUHUFINS = «Journal of Hunan First Normal School» (China)
JOUJICOT = «Journal of Jinchu College of Technology» (China)
JOUHQ = «Journal of Qilu» (China)
JOUNAN = «Journal of Nanjing College of Arts» (China)
JOWU = «Journal of Wuhan University» (China)
JOXIANU = «Journal of Xi'an University of International Studies» (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 = «The Journal of Pacific History» (United Kingdom)
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)
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)
- LIT = «Lituanistica» (Lithuania)
- 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)
- MÄE = «Mäetagused» (Estonia)
- 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)
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)
NEWW = «News and Writing» (China)
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 Issledovanyakh» (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)

- OES = «ÕES (Õpetatud Eesti Seltsi) aastaraamat/The Yearbook of Learned Estonian Society» (Estonia)
- ONDE = «O Novo despertar» (Portugal)
- ORE = «Oxford Review of Education» (United Kingdom)
- OSS = «Образование в Современной Школе» (Russia)
- OTECH = «Образование и технологии. Godishno nauchno-metodicheskoe spisanie» (Bulgaria)
- OTS = «Открытая Школа» (Russia)
- OUP = «Образование в условиях Перехода Новые Стандарты» (Russia)
- OZP = «Otechestvennaya i Zarubezhnaya Pedagogika» (Russia)
- PDG = «Pedagogika» (Lithuania)
- PDV = «Преподаватель XXI Век» (Russia)
- PE = «People's Education» (China)
- PED = «Pedagogika» (Bulgaria)
- PEDASZE = «Pedagógia történeti szemle» (Hungary)
- PEDG = «Pedagogika» (Russia)
- PEDISK = «Pedagogika iskusstva» (Russia)
- PEDIZ = «Pedagogicheskie izmereniya» (Russia)
- PEDS = «Pedagogija (P)» (Serbia)
- PEDST = «Pedagoška stvarnost» (Serbia)
- PEED = «People's Education» (China)
- PENSE = «Pensar Enfermagem» (Portugal)
- PER = «Perspectiva. Revista do Centro de Ciências da Educação» (Brazil)
- PERAS = «Per Aspera ad Astra» (Hungary)
- PERS = «Preschool Education Research» (China)
- PH = «Paedagogica Historica» (Netherlands)
- PHHE = «Perspectives on the History of Higher Education» (USA)
- PNPR = «Pedagogicheskaya Nauka i Praktika – Regionu» (Russia)
- PO = «Pedagogia Oggi» (Italy)
- 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: teoriya i praktika» (Russia)
- PROPO = «Problemy pedagogicheskogo obrazovaniya: istoriya i sovremennost'» (Russia)

- PROQ = Prospects, Quarterly Review of Comparative Education (Schwitzerland)
PROS = «Profilnaya Shkola» (Russia)
PSEKA = «Paar sammukest. Eesti Kirjandusmuuseumi aastaraamat» (Estonia)
PSIKHOL = «Psikhologiya i shkola» (Russia)
PSM = «Pedagogika v Sovremennom Mire» (Russia)
PSO= «Problemy Sovremennogo Obrazovanya» (Russia)
PST = «Portuguese Studies» (England)
PTE IGYK = «PTE-Igyk» (Hungary)
PTP = «Pedagogy. Theory & Praxis» (Greece)
PUBLIR = «Publication Research» (China)
PUBS = «Publishing Square» (China)
PZB = «Pedagocheskyj Zhurnal Bashkortostana» (Russia)
QB = «Quaderni della Brianza» (Italy)
QDS = «Quaderni di didattica della scrittura» (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)
RBE = «Revista Brasileira de Educação» (Brazil)
RBHE = «Revista Brasileira de História de Educação» (Brazil)
RCE = «Revista de Ciencias de la Educación» (Spain)
RDO = «Rozprawy z Dziejow Oswiaty» (Poland)
RECHIL = «Research of Chinese Literature» (China)
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)
REED = «Research of Elementary Education» (China)
RELUE = «Revista Lusófona de Educação» (Portugal)
REMOCL = «Research of Modern Chinese Literature» (China)
ROSET = «Research of Education and Teaching» (China)
REPD = «Revista Profissão Docente» (Brazil)
REPMA = «Research of Press Marketing» (China)
REV = «Review of Chinese Books» (China)
REVA = «Review of Arts» (China)
REVM = «Review of Modern Writers» (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 = «Interações- Revista Internacional de Desenvolvimento Local» (Brazil)
- RIPEDI = «Ricerche di pedagogia e didattica» (Italy)
- RIPEDI = «Ricerche di pedagogia e didattica» (Italy)
- RMHE = «Revista Mexicana de Historia de la Educación» (Mexico)
- RN= «Revue du Nord» (France)
- RP = «Rassegna di Pedagogia» (Italy)
- 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)
- RSEDU = «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 Shkencape 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)
- SCIENOF = «Science of Publication» (China)
- 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)
- SES = «Società e Storia» (Italy)
- SFLT = «Shandong Foreign Language Teaching» (China)
- SHB = «Shkol'naya Biblioteka» (Russia)
- SIBUCH = «Sibirskij uchitel» (Russia)
- SIS = «Sisyphus - Journal of education» (Portugal)
- 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)
SOUTLIF = «Southern Literary Forum» (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 = «Social Scientist» (China)
SS = «Studi Storici» (Italy)
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)
TID = «Tradiciya ir dabartis. Mokslo darbai» (Lettland)
TILT = «Tiltai» (Lithuania)
TLJA = «Theodor-Litt-Jahrbuch» (Germany)
TM = «Theory Monthly» (China)
TORN = «Történelemtanítás» (Hungary)
TRAN = «Translation in China» (China)
TRR = «The Russian Review» (Usa)
TRUS = «Truth Seeking» (China)
TT = «Teachers and Teaching» (United Kingdom)
TÜAK = «Tartu Ülikooli Ajaloo Kõsimusi» (Estonia)
TUDAS = «Tudásmenedzsment» (Hungary)
TÜLEKKKA = «Tartu Ülikooli Lõuna-Eesti keele- ja kultuuriuuringute keskuse aastaraamat» (Estonia)
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)
UPRAOB = «Upravlenie i obrazovanie» (Bulgaria)
UPRASO = «Upravlenie sovremennoj shkoly» (Russia)
US-CHI = «US-China Education Review» (Usa)
UZKU = «Uchenye Zapiski Kazanskogo Universiteta. Serya Gumanitarnykh 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 = «Vysshe Obrazovanie v Rossii» (Russia)
VORS = «Vysshee 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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