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Centro di Documentazione e Ricerca sulla Storia del Libro Scolastico e della Letteratura per l'Infanzia c/o Dipartimento di Scienze della formazione, dei Beni culturali e del Turismo, Università degli Studi di Macerata, Piazz.le Luigi Bertelli (C.da Vallebona) – 62100 Macerata, tel. (39) 733 258 5965 – 5967, fax (39) 733 258 5977

web: <http://www.hecl.it>;

e-mail: roberto.sani@unimc.it

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*Essays and
Researches*



Saggi e
Ricerche

Historical development of Islamic integrated education in Malaysia since 15th Century: current needs for the globalized world*

Sidek Bin Baba
Faculty of Education
International Islamic University
Malaysia
Kuala Lumpur (Malaysia)
sidek@iium.edu.my

Mohamad Johdi Salleh
Faculty of Education
International Islamic University
Malaysia
Kuala Lumpur (Malaysia)
johdi@iium.edu.my

Tareq M. Zayed
Faculty of Education
International Islamic University
Malaysia
Kuala Lumpur (Malaysia)
tareq.zayed@live.iium.edu.my

Ridwan Harris
Faculty of Education
International Islamic University
Malaysia
Kuala Lumpur (Malaysia)
ridwan200182@gmail.com

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ABSTRACT: Unlike traditional Islamic education (IE) systems, Islamic Integrated Education (IIE) emphasizes on developing graduate competency to generate employability to cope with an increasingly globalized world, while pursuing the core principles of IE. This paper tracks how IIE grew in Malaysia in the course of time and what are the opportunities offered for the students currently in primary, secondary and tertiary levels at IIE institutions. Historically, Islamic education in the Malay Archipelago (presently modern day Malaysia) started since Muslims ruled in Melaka around the 14th century. After the independence from British colonization, Malaysia retained the dualistic system of education i.e. separate Islamic and secular education systems. At current time, the Islamic education has been developed in an integrated way to accommodate the advancement of science and technology in Islamic subjects and thoughts. In this light, this paper presents the development of major aspects of IIE, such as pedagogy, curriculum, textbooks, teacher's training and assessment through the different ages till the present, based on available resources. Finally, this paper suggests that the IIE still needs to be enhanced in terms of quality and quantity of the educational institutions and the teachers. In this regard, teachers must be adequately trained to be able to creatively integrate the teaching of the Muslim holy scripture, the «Quran» with science, and vice versa.

EET/TEE KEYWORDS: History of education; Islamic education; Globalization; Malaysia; XVth-XXth Centuries.

Introduction

Malaysia is a Southeast Asian country occupying parts of the Malay Peninsula and the island of Borneo. It is known for its abundant natural resources and mix of Malay, Chinese, Indian and European cultural influences. It is the 41st most populated country in the world where Muslims are the largest community. According to national education philosophy, the Malaysian education system emphasizes on Islamic morality and etiquette, learning and practicing good manners. Primary schools and secondary schools offer some specialized subjects to instill good manners and rectify the students' relationship with God, self, family, immediate environment, society and nation. The curriculum contents aim at meeting the religious and spiritual needs of every Muslim to achieve happiness in this world and in the hereafter. The curriculum is designed in accordance with the level and capacity of secondary school students.

Generally speaking, Islamic education seeks to establish a Muslim personality with highly developed spiritual, physical, emotional, intellectual and social potential¹. In doing so, the purpose of Islamic education is to form a good citizen who is pious, has good morals and has an understanding of the modern technology as well. The Malaysian education philosophy also follows this aim

¹ S. Baba, J.M. Salleh, T.M. Zayed, R. Harris, *A Qur'anic Methodology for Integrating Knowledge and Education: Implications for Malaysia's Islamic Education Strategy*, «The American Journal of Islamic Social Sciences», vol. 32, n. 2, 2015.

to develop a righteous personality having the quality of the spiritual, moral, and intellectual ability. Unfortunately, in the reality, the Islamic educational institutions are facing challenges in terms of substance and format. Firstly, there is a dualism in the curriculum which needs to be remedied through integration between Islamic knowledge and socio-scientific knowledge. Philosophically, in Islam the source of knowledge is the divine revelation. While the modern education system only acknowledges enquiry and observation based knowledge, the Islamic education system usually faces difficulty in adjusting to the pace of development of scientific advancement because in the modern educational subjects and courses the Islamic epistemological belief is denied. Therefore, the integrated system, imparting knowledge of both religious and secular sciences, must recruit and appoint teachers who have thematic understanding of both the Quran and science. This is so that the teachers can creatively integrate the Islamic knowledge and secular knowledge.

Keeping this view in mind, we shall begin with a brief exploration of the development of Islamic education from the beginning of the documented history of Malay Archipelago till the time of independence, followed by a discussion on the current Islamic educational reform to introduce a complete Islamic Integrated Education (IIE) system. Education cannot be logically isolated from the context of society, from external normative and social influences². It should treat the development of the country, in relationship with the multiplicity of attitudinal, historical and cultural factors affecting its economic, political and social life.

Early Development of Islamic Education in Malaysia (1414-1511)

Islamic education in Malaysia (Malay Archipelago) started since Muslims began to rule in Melaka around the 14th century. However, the Islamic education at that time was not formal in nature³. According to Mohd Roslan, Mohd Nor, Wan Mohd Tarmizi, the first king of Melaka i.e. Parameswara (later known as Megat Iskandar Shah) had embraced Islam in 1414 AD. His example followed by the royal princes and a lot of people, who also converted to Islam. After that, the development of Islamic education system gradually began in Malay Archipelago. In order to increase his understanding of Islam, the king studied with many Islamic scholars and preachers who had come to Melaka at that time. However, he did not formulate any specific legal provision

² M. Rudner, *Education, Development and Change in Malaysia*, «South East Asian Studies», vol. 15, n. 1, 1977, pp. 23-62.

³ W.O.M. Roslan, M.Nor, W.M. Tarmizi, *Sejarah Dan Perkembangan Pendidikan Islam*, «Jurnal At-Ta'dib», vol. 6, n. 1, 2011, pp. 59-78.

which obligated one to learn or teach the mass people Islamic teachings formally nor informally.

Phase	Characteristics	Description
Entrance of Islam to Malay archipelago (1414 AD)	<ol style="list-style-type: none"> 1. Only for royal family 2. Not formal 3. Quranic studies 4. Basic Islamic teachings 	The first king of Melaka i.e. Parameswara (later known as Megat Iskandar Shah) embraced Islam in 1414 AD and was followed by the royal princes and a lot of people, who then began the development of Islamic education system in Malay Archipelago
Early Development period (1459-1477)	<ol style="list-style-type: none"> 1. Islam became formal religion of the kingdom 2. Islamic education became formal 3. introduced the Jawi letters 4. Introducing various branches of Islamic teachings, e.g. Fiqh, Tauheed, Tafsir, History, Tasawuf, and others 	Islamic education in Melaka grew up and flourished. It became the Islamic centre. The Islamic education also spread to other lands in Malay Archipelago i.e. Johor, Pahang, Jambi, Kampar, Bangkalis, Bentan, and others especially during the times of Sultan Mansur Shah

Table 1. Islamic Education in the Early Period in Malay Archipelago (1414-1511)

Furthermore, the king helped to promote teachings among people to give serious attention to religious practices. For example, Sultan Muhammad Shah conducted a special ceremony for welcoming Ramadhan month. On another occasion, the king attended the prayer congregation at the twenty-seventh night of Ramadhan for performing prayers (Tarawih) together with the people at the mosque. The king used to attach high importance to religious textbooks and the laws of the Shari'ah. Moreover, the people of Melaka at that time were simultaneously involved in developing Islamic education through various Islamic teaching-learning programs at their homes, mosques, and community places. Additionally, the Islamic education was focused at that time on the reading of the Quran⁴. It was the common educational practice at all levels of society, although not in a formal classroom environment. At that time, the ruler also introduced the Jawi letters (similar to Arabic letters) to facilitate local residents to learn Arabic letters as supporting tools to learn the Quran. It is noteworthy that the Jawi letters were a combination of the Arabic and Persian

⁴ *Ibid.*

letters, which were intentionally adopted to support learning the Quran and to unite the entire community under the banner of Islam.

Islamic education at Melaka continued to grow and spread fast and it became the Islamic centre where various Islamic subjects such as Fiqh (Islamic jurisprudence), Tauheed (monotheistic belief), Tafsir (exegesis), History, Tasawuf (spirituality), and other subjects were taught. Subsequently, Islamic education also spread to other lands in the Malay Archipelago such as Johor, Pahang, Jambi, Kampar, Bangkalis, Bentan, and others, especially during the times of Sultan Mansur Shah (1459-1477).

Islamic Education during Western Colonization (1511-1957)

Muslim historians of Malay Archipelago consider the British arrival and subsequent colonization of Melaka in 1511 as the start of the Dark Age in the Malay empire and civilization as economics, politics, culture, religion and education were seriously undermined at this junction. The arrival of the British had a negative impact on many life aspects of Malay people, especially on mentality and religious aspects that led to moral decline in their life. In fact, the downfall of the Malay civilization did not allow Islamic development and conversely facilitated the spread of Christianity in the Malay Archipelago which was one of the main goals of Western imperialist.

Fortunately, the invaders were unsuccessful in changing the creed (*Aqeedah*) of the Malay people, which had been established in the light of Islamic teachings. Nevertheless, their imperialism influenced the Islamic education system in the Malay Archipelago. For example, when the Portuguese had colonized Melaka, they limited the Islamic spread and learning until the application of Islamic ruling became very restricted. Furthermore, there was a report that when the Dutch colonized Malay, they strictly limited the spread of Islam and its propagation, such that Muslim people were only able to receive Islamic teaching through home schooling.

After that, the government of Britain allowed the establishment of Malay schools, through which Islamic education system reportedly running better than before. After 1854, the Malay schools had been taken over by British East Indies Company, which provided full assistance on the condition that they should teach modern sciences like arithmetic besides the Islamic teachings. As a result, the Malay student's schooling time was divided into two sessions- a session for studying general science in the morning, which was fully supported by British government, and a session for the Islamic teachings (especially Al Quran) in evening, which was not funded by the Government but run by people's financial support. This rule was written in the education act of Malay

Peninsular and Melayu Federal Country in 1936 at the duty list of Education Melayu Ministry. It can be said that the beginning of the secular education in Malaysia began with this act.

In addition, the Malay community was still maintaining the tradition of Islamic education through the 'Pondok' system. This system was like the modern boarding school system. The only difference between the current boarding schools and the Pondok is that Pondok traditionally used to teach the old book of Islamic teachings called 'turath' such as fiqh, tafsir, tasawuf, hadith, etc. The main activity of this 'Pondok' was worshipping Allah in the mosque along with reading and reviewing the book of Islamic teachings from the first page until the end of this book. Furthermore, this system was developed with infrastructure such as school buildings, hostels, and offices in order to provide facilities to the students. Many students who successfully graduated from this madrasah system continued their study at the tertiary level in the universities of Middle East such as University of Al Azhar in Egypt. After completion of their study, they came back to Malay land with new spirit to make a change in their community with a better understanding and practice of Islamic traditions. One of the leaders, Syed Sheik Al Hadi, was involved in community service and leadership efforts and played an important role in the transformation of the education system of Pondok. He established a madrasah in Bukit Mertajam, Seberang Prai in 1906 that was familiar as the Madrasah al Misriyah. Then in 1907, he also established Madarasah Iqbal in Singapore and Madarasah Al Hadi in Banda Kaba Melaka in 1917.

Islamic schools have always been a part of the Malay Muslim communities, long before the British came to Malaysian shores. The traditional Islamic schools, known as pondok, were the only mode of knowledge transmission which existed before the British introduced mass education. The Pondok education still exists today. In this type of educational institute, students sit in a class around a knowledgeable teacher. It is stipulated that male teachers teach male students while female teachers teach female students. The primary objective of this system is to instill values in the students in order to make them good Muslims. Special emphasis is given to focus on practical knowledge⁵. Thus, it is imperative to focus on the effect of education on individuals by looking at the curriculum, pedagogy, foundations (philosophy) etc. In addition, education should also aim at the individual perfection of the students. The worldview inculcated during the student's education period plays an important role in attaining this perfection.

⁵ N. Othman, K.A. Mohamad, *Eclectic Model in the Malaysian Education System*, «International Education Studies», vol. 4, n. 4, October 31, 2011, pp. 111-117.

Phase	Characteristics	Description
Beginning of Colonialism (1511)	<ol style="list-style-type: none"> 1. Change in life 2. Difficulties in practicing Islamic teachings 3. strictly limited the spread of Islam and its propagation 	The arrival of Western colonialism has abolished many aspects of Malay tradition and culture, especially in personality and religious aspects that led to the moral decline and religious weaknesses. The colonization made the growth of Malay civilization slower and conversely has facilitated spread of Christianity in Malay Archipelago that was one of the main goals of Western imperialists.
During imperialism period (1854)	<ol style="list-style-type: none"> 1. Dualism in education system (operation of secular and religious education separately) 2. Formal and informal education 	British East India Company took over Malay schools and introduced secular and religious education in two different sessions in morning and afternoon. The session for learning science was funded by British government, while the session for learning Islam was funded by the locals.
Immediate before independence (1906-1907)	<ol style="list-style-type: none"> 1. Establishing more madrasah with better condition and curriculum i.e. fiqh, tafsir, ect 2. Students' good understanding of Islam 3. Islamic education movement 	The madrasah had better infrastructure such as school buildings, hostels, and offices. Many students continued their study to university level in Middle East countries, like University of Al Azhar in Egypt and came back with new spirit to make a change in their community with better understanding of Islam. Syed Sheik Al Hadi in Bukit Mertajam was popular in this regard.

Table 2. Malaya Islamic Education during Colonialism (1511-1957)

Development of Islamic Education after Independence (1958-1977)

Islamic education encountered fast development when the Malay achieved independence in 1957. This occurred when the Malaysian parliament recommended that Islamic education systems be developed. Later, in the light of the Education Ordinance in 1957, the religious education system got the necessary budget from the government. The recommendation of Abdul Rahman Talib in 1960 stated that all expenses of Islamic education must be borne by the

Ministry of Education. Furthermore, Islamic teachers were appointed to teach Islamic subjects and all Muslim pupils were guaranteed to be taught the Islamic subjects for the first eleven years i.e. six years in elementary level and five years in secondary level. The Islamic religious affairs – to some extent – were reformed under the authority of the Great King of Malaysia and kings of Malay states, and the syllabus of Islamic education was approved by the Council of Kings before being implemented in schools between the years 1962-1967.

It is clear from the above that Islamic education had given attention after Malaysia achieved independence in 1957. In 1960, the government began to implement education policy based on the Rahman Talib Report. That report suggested that the government open Islamic education section where at least fifteen students are available⁶. Islamic higher education has also started playing a role in spreading Islamic education in Malaya Archipelago beginning in 1950s when the Islamic College of Malaya was established. Establishing institutions of higher Islamic studies initially was seen as a public demand. Later, many religious schools were established. To meet the increasing demands for specialization in Islamic education, the government established more Islamic colleges and universities with variety of specialization such as Shari'ah, fiqh, and history.

In the end of 1970s, the emergence of Islamic revivalism across the Muslim world gained momentum, which had a great effect on Malaysia as well. Various Islamic groups began to rise and they implemented Islamic shariah in reforming many of the government policies. As a result, in academia, more funding was allocated for developing Islamic instructions and many schools were built in Malaysia.

Phase	Characteristics	Description
Independence period (1957-1967)	<ol style="list-style-type: none"> 1. expenses of religious education system 2. Organized religious education system for all Muslim people 3. Establishing roles for religious school 	<p>Ministry of Education appointed religious Islamic teachers to teach Islamic subjects. Muslim students were guaranteed to get the Islamic education for eleven years. The Islamic religious affairs department was brought under the authority of the king of Malaysia. Syllabus of Islamic education required approval by the Council of Kings before being implemented in schools.</p>

Table 3. The Development of Malaysian Islamic Education after Independence

⁶ Roslan, Nor, Tarmizi, *Sejarah Dan Perkembangan Pendidikan Islam*, cit.

The First World Conference on Muslim Education (1977) & Malaysian NEP (1996)

The reformation of Islamic education in Malaysia was inspired by the recommendations of the First World Conference on Muslim Education held in Mecca in 1977. According to recommendations from that conference, knowledge needed to be propagated in the spirit of Tawhid leading towards the recognition of Allah as the absolute Creator and Master of humankind. Thus, all disciplines of knowledge should lead towards subservience of this truth. Knowledge is a form of trust (*amanah*) from Allah to man, and hence, man should utilize knowledge according to Allah's will in performing his role as the servant and vicegerent (*khalifah*) of Allah on earth. In this way, the seeking of knowledge is regarded as an act of worship⁷.

Just 2 years after the world conference, the Committee Cabinet reviewed the implementation of national policies of education and curriculum in 1979. As a result, the New Primary School Curriculum (Kurikulum Baru Sekolah Rendah – KBSR) and Integrated Secondary School Curriculum (Kurikulum Bersepadu Sekolah Menengah) were introduced and implemented nationally. As an outcome of KBSR, Islamic subjects were made obligatory that could be taught in the primary and secondary schools and were included in the national examination certification i.e. Lower Education Certification (Sijil Rendah Pelajaran) and Malaysian Education Certification (Sijil Pelajaran Malaysia). In 1988, the new primary school curriculum was merged with the integrated secondary school curriculum (KBSM).

While the KBSR was introduced Islamic education subjects emphasized on practice in reading Al Quran and in basic religious education, including Islamic faith, worship, prophetic teachings and histories, and moral practice. In 1993, when the Integrated Primary School Curriculum (Kurikulum Bersepadu Sekolah Rendah) was introduced, Islamic subjects were added under another area, namely study of the moral character i.e. *akhlak Islami*. Moreover, the Islamic subjects have three areas, namely teaching Al Quran, Islamic law (Shariah), and Islamic Morality (Akhlak). The goal of this additional subject was to shape the student's behavior and their character.

After attending the schools that follow the Islamic Education curriculum, students were envisioned to become capable to achieve the following objectives of KBSR:

1. Reciting juzu 'amma (i.e. last part of the Quran) fluently and correctly to foster interest in reading the full Quran and practice in life.
2. Memorizing the verses commonly selected for reading in the daily prayers and worship.

⁷ C.N. Hashim, H. Langgulung, *Islamic Religious Curriculum in Muslim Countries: The Experiences of Indonesia and Malaysia*, «Bulletin of Education & Research», vol. 30, n. 1, 2008, pp. 1-19.

3. Understanding the meaning of some verses and appreciating the lessons learned in order to help them strengthen belief in the Quran as a reference and guidance of Allah SWT.
4. Understanding and believing that faith is important for religious beliefs.
5. Applying the basic rituals in Fardhu 'Ain and understanding when Fardhu Kifayyah is applicable.
6. Understanding and learning the *seerah* of Allah's Messenger (peace be upon him), as it is the basis of human civilization and development.
7. Practicing good manners and appreciating moral values in everyday life.
8. Reading and writing *Jawi*, as it is the key to the nation's cultural heritage.

Another aspect of reformation of Islamic education in Malaysia was the introduction of Malaysia's education policies in the Education Act and its implementation during 1961 to 1996. The Education Act 1996 is the latest and the most comprehensive where it stated for the first time in writing the National Educational Philosophy (Under Act 550). The official statement of NEP states as follows:

Education in Malaysia is an on-going effort towards further developing the potential of individuals in holistic and integrated manner so as to produce individuals who are intellectually, spiritually, emotionally and physically balanced and harmonious, based on the firm belief in and devotion to God. Such an effort is designed to produce Malaysian citizens who are knowledgeable and competent, who possess high moral standards, and who are resilient and capable of achieving a high level of personal well-being as well as being able to contribute to the betterment of the family, society and the nation at large.

This NEP calls for «developing the potential of individuals in a holistic and integrated, knowledgeable, competent manner and possess high moral standards»⁸. Indeed, he stated that, based on the NEP, the planning of KBSM would help students to develop their intellectual, spiritual, emotional as well as physical potential in a comprehensive and integrated manner. It was anticipated that the comprehensive and integrated development would create students who would be able to adjust themselves to the society and contribute to the progress and the welfare in order to function effectively and productively in the national development.

Consequently, the above NEP mentioned outcome is observable from an integrated curriculum; there are also sixteen core values prescribed in the national education philosophy. They are cleanliness of body and mind, compassion and tolerance, cooperation, courage, moderation, diligence, freedom, gratitude, honesty, humility and modesty, justice, rationality, self-reliance, love, respect and public integrity. In the integrated schools, value education in one form or another has always been a part of the Malaysian educational curriculum.

⁸ H. Langgulong, *Islamic Development and Human Resources Development in Muslim Countries*, «Muslim Education Quarterly», vol. 18, n. 1, 2000, pp. 65-79.

Phase	Characteristics	Description
The First World Conference on Muslim Education (1977)	<ol style="list-style-type: none"> 1. Integrated Islamic Education and curriculum 2. Establishment of New Primary School Curriculum (Kurikulum Baru Sekolah Rendah (KBSR)) and Integrated Secondary School Curriculum (Kurikulum Bersepadu Sekolah Menengah) 	Recommendations include suggestion that knowledge shall be propagated in the spirit of Tawhid leading towards the recognition of Allah. Thus, all disciplines of knowledge should lead towards subservience of this truth. Humankind should utilize knowledge according to Allah's will as His servant and vicegerent (khalifah).
The Malaysian National Education Philosophy (NEP) (1996)	<ol style="list-style-type: none"> 1. Holistic and integrated Islamic education system 2. The curriculum possesses high moral standards, intellectual, spiritual, emotional and physical potential in a comprehensive and integrated manner 3. Establishment of J-QAF program i.e. Jawi alphabet, reading Al Quran, Arabic. 	Education in Malaysia is an on-going effort towards further development of the potential of individuals in holistic and integrated manner to produce individuals who are intellectually, spiritually, emotionally and physically balanced and harmonious, based on the firm belief in and devotion to God. Such education is designed to produce knowledgeable and competent citizens with high moral standards, and who are resilient and capable of achieving a high level of personal well-being as well as being able to contribute to the betterment of the family, society and the nation at large.

Table 4. Implications of the first World Conference on Muslim Education & Malaysian NEP

Like other subjects, religious subjects in integrated schools are also subject to changes and adaptations parallel with the change of time and needs. Efforts were also made to expand the curriculum to include teaching of Islam as a way of life. Co-curricular activities were designed to make classroom teaching more effective. The term «Islamic education» was used instead of «Islamic studies» to reflect this scope⁹.

The Islamic Education system divided the total Islamic curriculum into categories. In primary schools the students were taught tilawah al-Quran, 'Ulum Syari'yyah, moral education; Islamiyya and autobiographical studies. In the area of Al-Quran tilawah the focus is on; reading the Signs of the Quran with precision and fluency, precision and fluency in the memorization of verses from the Quran and understanding the meaning of certain verses from the juzu 'amma (30th part of the Quran) and appreciating the lessons. 'Ulum Shari'yyah focuses on purifying one's beliefs, attitude and responsibility towards Allah, knowledge of worshipping and taking the Prophet (peace be upon him) as a role model and

⁹ R.H. Ahmad, *Educational Development and Reformation in Malaysia: Past, Present and Future*, «Journal of Educational Administration», vol. 36, n. 5, 1998, pp. 462-475.

learning from his *seerah Islamiyya* (i.e. biography). Moral education focuses on compliance with the Islamic rules and regulations regarding the Muslim way of life and in relationship with Allah and the Prophet and compliance with the Islamic rules and regulations, and procedures of human relationships with self, family, environment, society and nation.

Furthermore, Islamic subjects continued to be empowered with the existence of J-QAF program that included *Jawi* alphabet, reading the Quran, Arabic, and study of *fardu ain* (basic personal Muslim obligation). This program wanted to ensure that pupils in primary and secondary schools to have strong grounding in Islamic faith and appreciation of individual daily religious duties. In fact, this J-QAF program was not only an effort to strengthen Islamic education but also to strengthen the national education system. This program was implemented in 2005 in primary schools and the government wants to implement it in the secondary school level too after all primary schools have fully implemented it.

Recent Establishment of Islamic Education Institutions

In response to the pressing need for a holistic Islamic education system, the Islamic integrated schools in Malaysia offer a viable option that can meet the needs of the people. At the same time, these schools are in their developing stage. In this situation, there is a lack of studies on what the integrated education has successfully implemented in more than last two decades. For example, the issue of integration between Islamic worldview and science has not yet been resolved through this integrated education system. Similarly, Malaysia's Islamic Education curriculum is divided into two parts – KBSR (Integrated Curriculum for Primary Schools) and KBSM (Integrated Secondary School Curriculum) at the school level. Each has its own curriculum objective, provision of time and its own characteristics of specific learning outcome. Moreover, the International Islamic University of Malaysia (IIUM) was established in 1983 as a centre to Islamize aspects of human knowledge. Particular attention was given to social sciences and humanities for rendering them useful and relevant to the Muslim community¹⁰. Hence, these institutes have had an influence on Islamic education and presented Islamic ideology to the Malaysian society¹¹.

The current reforms in Malaysian education are a continuation of the efforts that began in 1980s, but now encompass more than the school system. The reforms of the 1990s culminated with the introduction of the Education Act 1996. This act outlines some specific policies that reiterate the Educational

¹⁰ Taken from mission and vision of IIUM available at <<http://www.iium.edu.my>> (last access: 15.05.2017).

¹¹ Othman, Mohamad, *Eclectic Model in the Malaysian Education System*, cit.

Act of 1961, strengthening it to include all levels of education, including preschool and post-secondary education, which had been out of the scope of the Education Act 1961. Furthermore, the Education Act 1996 allowed the establishment of private universities. Later, a dilemma had grown as to whether value education would give to the learners of tertiary levels or adhere to the Malaysian educational philosophy at all levels. It is mentionable that the infusion of Malaysian values into tertiary and higher education – public and private, is doubly difficult as compared to the process in schools. Furthermore, the opening of private branch campuses of foreign universities brings to us another issue of infusing Malaysian values into the Malaysians. Following is a brief account of established IIE institutes.

National Islamic Integrated Education System

National Religious Secondary Schools (SMKA)

In the 1970s, before the establishment of SMKA there was no good administrative system or strong infrastructure at Islamic education institutions. As public awareness of education increased, the Ministry of Education consulted state governments in Peninsular Malaysia to initiate the administrative system and form a curriculum for Islamic religious schools. However, many schools used to emphasize much more on Islamic studies and Arabic only without paying attention to other subjects such as Science, Mathematics, Geography and others. Thus, the religious school graduates were found to be less capable to compete with the graduates of traditional institutions to face the challenges of the current society. In order to remedy this, in course of time, SMKA came into existence.

The SMKA stands for Sekolah Menengah Kebangsaan Agama or National Religious Secondary School¹². It is a type of a group of institutions managed by the Ministry of Education Malaysia. The schools began with the acquisition of 11 schools by People's Religious Affairs under the Ministry of Education in 1977. The number of SMKA's has increased from 11 to 57 now. The idea was formulated during the early days of then SMKA Director of Religious Education Ministry, the late Haji Nik Mohammed Mohyideen bin Haji Wan Musa. The intention of the Ministry of Education was to take into consideration the aspirations of the Muslim community. Previously, many steps had been taken to provide assistance to schools, and religious schools had proposed to apply the new system. The establishment of the SMKA was in line with the modernization efforts of the state education system. The process improvement

¹² See for details <www.moe.gov.my> (last access: 15.05.2017).

system of Islamic education in religious schools was also in accordance with current developments¹³.

Integrated Fully Residential Schools (SBPI)

National Religious Secondary Schools (SMKA) started towards upgradation as fully residential schools by the year of 2000. The boarding schools are called «integrated fully residential schools» (Sekolah Berasrama Penuh Integresi – SBPI). The concept of integration combines three educational streams – pure science, religious pure science and technical science. A total of 14 integrated boarding schools (SBPI) were initially opened. Later on, many SBPIs were established all over the country, which acted as complimentary to the existing SMKA. The focus of this concept was to strengthen Islamic understanding among students and to also offer them knowledge of the sciences and technical knowledge. For example, the IIUM and Jakim annually enroll the best students from SMKA and provide them the opportunity to extend their studies in Darul Quran, Kuala Kubu Baru for an 18-month program in order certify them for Tahfizul Quran (memorization of the Quran).

Later on, they get the opportunity to enroll into several disciplines of sciences and other professional subjects. The *huffaz* (memorizers of the Quran) are given proper attention and quality education aiming at nursing them to become future academicians for developing a more integrated way of Islamizing various disciplines. With this integrated approach, it is anticipated that students and scholars will be produced from all fields of knowledge compatible with time and space factors. Furthermore, these graduates will be able to reform the education and knowledge on true epistemological foundations of Islam.

MARA Junior Science School (Ulul Albab)

MARA Junior Science School (MRSM) is a boarding school established by Majlis Amanah Rakyat (MARA) in almost every state in Malaysia. The first MRSM was established in 1972 to provide better opportunities to the children of Malay and Bumiputera through better teaching in the field of pure science. In 1998, the Division of Education and Training established a school program that offers additional subjects like Al-Quran and As-Sunnah, Islamic Sharia and

¹³ A.F.A. Hamid, *Islamic Education in Malaysia*, vol. RSIS Monograph, Singapore, S. Rajaratnam School of International Studies, 2010, p. 44.

Arabic, while maintaining a high standard of science education. The program was later named as Ulul Albab School.

Mara Junior Science School was trying to implement Philosophy of Education as part of an ongoing effort, and scientific dynamics to improve the quality of self, community, country and make one the servant of Allah. This program ensures productivity, excellence, enrichment and development potential, leadership and creativity in students. Indeed, every student is unique, and possess special and high potential to move forward in attaining excellence by applying *Quranic*, *encyclopedic* and *Ijtihadic* knowledge. The motto of Ulul Albab is «Discipline, Knowledge and Charity» while its vision is to be a center of educational excellence and a world-class innovative project. In this regard, the corporate core values- Scientific, Independent, Creative, Trust and Patriotic (SIKAP), are to be applied to all staff through the teaching and learning process in a clear and integrated manner across subjects and curriculum.

Private Integrated Islamic Education

ADNI School

The school started in 1994 as an attempt at elevating the Muslim Ummah (i.e. Muslim nation) and aimed at providing the most suitable Islamic education model. The school espouses a balanced and integrated holistic education policy with the inclusion of *tarbiyyah* (i.e. Islamic way of education), and national and international academic programs. ADNI's education philosophy is balancing the growth of personality through *tarbiyyah* (i.e. Islamic way of education) of the spirit, the intellect, the emotions and the physical willingly and joyfully for the sake of Allah (swt). In this light, their mission is to develop excellent, holistic individuals toward building an excellent generation based on total submission to Allah (swt).

The secret to success in this life and the hereafter is to have knowledge and *taqwa*. The integrated and holistic education system that is aimed at being implemented in ADNI seeks to provide the means and avenues for all members of the ADNI family to develop and become *Muttaqin* i.e. individuals with a personality as defined by the Qur'an and As-Sunna. The intended learning outcomes are to enable the learners attain the abilities to get into doing things i.e. critical, creative, rational thinking. Moreover, the students must be intrinsically motivated with good *niat* (intention), and be able to make things happen properly. For these objectives, ADNI has three principles such as transfer of knowledge, action (*amal*), and strenuous efforts (*mujahadah*).

International Islamic School (IIS)

The International Islamic School (IIS) was established in September 1998 and was located then at Batu 14, Jalan Gombak. The school was a venture by Muslim scholars who were teaching at the International Islamic University Malaysia (IIUM). The IIS was established from the need for a model integrated Islamic school that could serve the children, especially Muslim expatriates. The school is thus a testimony to the university's continuous effort in providing quality, affordable, balanced, integrated and holistic education guided by the principles of Islam. It has grown from a humble beginning of 30 students to an enrolment of approximately 800 students today, ranging from nursery to A-level.

Being an Islamic school means to emphasize an integrated and balanced human development approach – intellectual, physical, spiritual, moral, emotional and social – based on the Islamic worldview anchored on Tawhid (the unity of God). The Islamic school takes care of spiritual and character education equally. The school enhances students' spirituality through enlightening about the natural phenomena, congregational prayers, Qur'an recitation and memorization, Qur'an studies and observance of Islamic *adab*.

Integrated Islamic Education in tertiary level

International Islamic University Malaysia (IIUM)

In response to the needs of integration, many colleges, departments in universities and universities were established all over Malaysia. The IIUM was established in 1983. From its inception, the IIUM has tried to respond to the crisis in knowledge sector as identified during the Makkah conference in 1977. The crisis has been described in the book of Syed Sajjad Husain and Syed Ali Ashraf, entitled «Crisis in Muslim Education»¹⁴. Since its establishment in 1983, IIUM has been committed to the integration of Islamic values with the modern fields of knowledge. Today, Islamization and integration of knowledge have emerged as the niche areas that distinguish IIUM from other universities in Malaysia and in other parts of the world¹⁵. Moreover, the philosophy of IIUM stresses the importance of *tawhid* as the basis of a holistic approach in teaching-learning processes. The clear vision and mission i.e IIICE (Islamization,

¹⁴ S.S. Husain, S.A. Ashraf (edd.), *Crisis in Muslim Education*, 1st ed., Jeddah, Hodder and Stoughton, King AbdulAziz University, 1979.

¹⁵ S.S. Abdallah, S. Hussien, N.A. Hisham, *The Experience of Islamization of Knowledge at the International Islamic University Malaysia*, in Y. Kazmi (ed.), *New Intellectual Horizons in Education*, Gombak, Kuala Lumpur, IIUM Press, 2011, pp. 91-111.

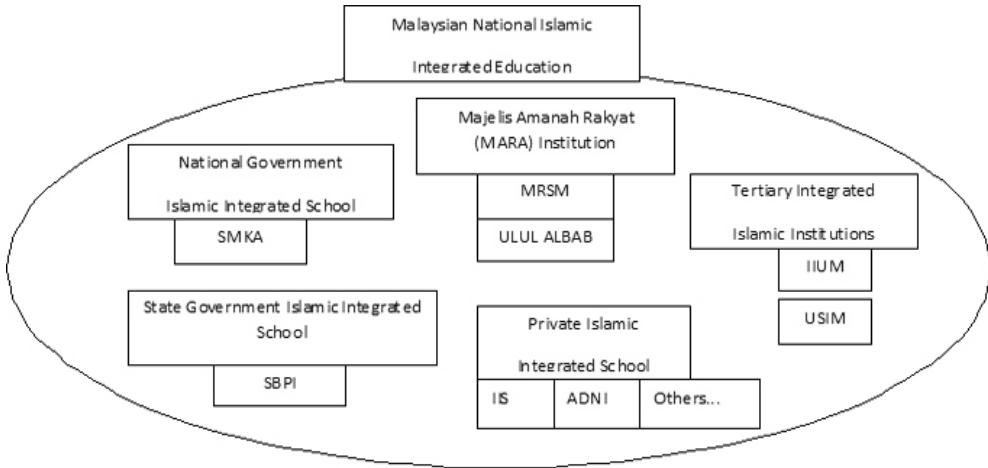
Integration, Internationalization and Comprehensive Excellence) has become the objective of this university.

English was made the language of instruction together with Arabic. This is to enable the students to be proficient in languages for acquiring modern knowledge and at the same time Islamic knowledge. The curriculum of the IIUM allows students to register some courses as 'major' according to their interest and similarly students also register some courses as 'minor'. The major and minor concept are to assist the students from various disciplines to integrate their understanding to the conventional knowledge in various fields to that of the Islamic one. For example, students of Revealed Knowledge are required to take 17 credit hours in Human Sciences subjects such as Psychology, Sociology, Communication, Philosophy etc. The same policy applies to students of Human Sciences who are required to enroll in 17 credit hours in the subjects of Revealed Knowledge. The same requirements also apply to Law, Economics and others. After completing the undergraduate degree, they can study for another year to finish the double major or double degree programs to acquire two types of knowledge together such as Civil Law together with Shariah, Islamic Revealed Knowledge together with Human Sciences, and Economics together with Islamic *Muamalat*, and so on. Through these kinds of processes, the integrated education system produces graduates having an integrated understanding of knowledge of several disciplines and can play a better role in the system. The inclusion of Arabic, *tilawah*, Islamic Understanding and Civilization made compulsory for every student may enhance the vision for Integration and Islamization¹⁶.

University Science Islam Malaysia (USIM)

There is a public Islamic university in Malaysia called USIM (University Science Islam Malaysia) which has been founded upon the motto of knowledge, discipline and devoutness. It is trying to integrate *naqli* and *aqli* knowledge as well as to develop good character among the students for generating an excellent generation and a knowledge society. The USIM, formerly known as Kolej Universiti Islam Malaysia (KUIM), was established in 1998. The USIM has eight faculties with 25 undergraduate programs. The objectives of USIM are to uphold Islamic studies, bring Islamic studies into the national main educational stream, and emphasize the use of information technology in education and

¹⁶ S. Baba, *Integration and Collaboration in Education and Learning*, Kuala Lumpur, Yayasan Ilmuwan, 2013; Id., *The Integrated Approach in Malaysian Education: The International Islamic University Malaysia as a Model*, «Jurnal Pendidikan Islam», vol. 13, n. 2, 2009, pp. 87-99.



Pic. 1. Establishment of IIE in Malaysia

research systems. Focus is also put on mastering Arabic and English language as well as the national language¹⁷.

The historical development of Islamic integrated education mentioned above, shows that the worldview among Muslim learners will remain unclear until proper Islamic education is implemented. This is why the colonizers wished to deform the proper Islamic education in Malaysia. Teaching and learning processes leave an impact on the students' worldview by which they can lead a moral and ethical life and thereby serve the nation effectively. That is why the Government changed the curriculum for the students after independence.

With the effort of the government, the Islamic integrated schools in Malaysia provide a viable solution for a holistic and integrated Islamic education system by offering the opportunity to choose between Islamic studies and professional fields such as medicine, engineering, and accountancy. The important point here is that regardless of the choices one makes, every student will have a good foundation in Islamic knowledge. The growing number of applicants to the Islamic integrated education system suggests that Muslims are beginning to accept it as an alternative to government schools and madrasahs, although it is yet to be considered as a trend that is becoming widespread. Compared to other types of schools, the number of Islamic integrated schools is much smaller. Unless these schools pursue an aggressive expansion plan in the near future, it would not be possible for them to cater to the growing demand. Currently, these schools select their students through entrance examinations and interviews. The relatively smaller number of students in these schools

¹⁷ Visit website of University of Islam Malaysia for details at <www.usim.edu.my/en> (last access: 15th May 2017).

has enabled the institutions to maintain a good academic record. It remains to be seen whether these schools are capable of handling a growing student population while maintaining their high level of quality¹⁸.

We also know that teachers are individuals who have their own beliefs, attitudes, and values that differ from one person to another. In integrating the values into their teaching, they are inevitably influenced by their own beliefs and will not give same emphasis to the values identified. However, teachers, especially those who were teaching in national secondary schools, complained about being unable to organize adequate religious activities for their students due to insufficient time and classroom shortage. Apart from this, success in the implementation of any extra-curricular activity depends largely on the organizers and their advisers. The teachers also observed that some of co-curricular activities were against Islamic teachings and principles¹⁸. For example, many of the students are attracted to entertainment activities like dancing and singing. In this study, the teachers claimed that the co-curricular activities at their schools have very limited contribution in developing *akhlaq* of the students. Some of these activities also put the students in a tight spot and a great dilemma because some of the activities and their implementation were unsuitable for the students or they contradict Islamic teaching.

Nevertheless, all of the teachers agreed that the existing school regulations and discipline had a positive contribution to the development of students' *akhlaq*. They did agree to the fact that schools should take necessary precautions to eliminate or in the least reduce the influence of negative elements of some selected co-curricular activities. Teachers were generally satisfied with the co-operation and support given by their colleagues in the schools. In other words, they did not have any problems nor did they face any major obstacles from their colleagues in terms of the development of students' *akhlaq*. However, a study related to Islamic schools revealed that some teachers had some disappointments with the attitudes of their colleagues who teach other subjects and who refused full co-operation towards developing the students' *akhlaq*¹⁹. For example, there were some teachers who feel no responsibility in developing students' *akhlaq*. They claimed that it was the duty of religious and discipline-teachers alone. A few teachers did not want to assist voluntarily in organizing the school's religious activities. They helped if and only when they were officially instructed

¹⁸ A.A. Rashid, A. Mamat, *Barriers of Moral Development among Adolescents: A Content Analysis of Empirical Literature*, in *International Conference On Teacher Education In The Muslim World*, Kuala Lumpur, Malaysia, Institute of Education (IIUM), 2013, pp. 1-13; A.A. Rashid, A. Mamat, B. Ibrahim, *Barriers to Moral Development of Adolescents and Parental Responsibility: The Case of Malay Working Parents*, «International Journal of Humanities Social Sciences and Education», vol. 1, n. 6, 2014, pp. 40-48.

¹⁹ Ab.H. Tamuri, *Islamic Education Teachers' Perceptions of the Teaching of Akhl q in Malaysian Secondary Schools*, «Journal of Moral Education», vol. 36, n. 3, September 2007, pp. 371-386.

by the school²⁰. These findings indicate that the process of integration will fail if there is no harmonious relationship among the teachers', principals', and parents' efforts.

An unexpected consequence of integration slogan has been observed in a book written by Rosnani Hashim, which says despite the fact that some recommendations for integrated education were positive, in the sense that they gave importance to religious instruction in national and national-type schools, yet they affected all Islamic religious adversely i.e. a decline in pupil enrolment because Malay parents saw many advantages in the national schools²¹. The second major consequence was the transformation of the Madrasah's curriculum in accordance with the National Educational Policy where the Malay language replaced Arabic as the medium of language and the religious subject had to be reduced to accommodate new secular subjects - Malay language, English, Mathematics, Geography, History and general Science. In addition, the third major impact of the National Education Policy was the shortage of teachers in the madrasah because qualified teachers left for better facilities and better pay offered by national schools. Madrasah institutions also had acute financial problems that needed rescue by state religious department²².

In fact, according to Mohd Kamal Hassan, after a decade there will be several types of Islamic education systems. There are some institutions, which follow secular education system and only the *aqliyah* (rational) subjects are studied there. Some predominantly religious educational institutions teach *aqliyah* subjects while other secular educational institutions offer some Islamic subjects. There are a few institutes that offer a balance of Islamic and *aqliyah* subjects and some offer two streams, Islamic and *aqliyah*; they make meaningful and dynamic interaction with one another²³.

The study of Tamuri (2007) explored the outcome of integrated educational institutions from the part of the teachers, students, and parents. His findings showed that maximum teachers testified positive influence of their schools' existing religious activities, such as religious talks, additional religious classes, celebrations of Islamic holy days, juma'ah (congregational) prayers and 'ibadah (worship) camps, on the development of students' *akhlaq*. The teachers have belief that the religious activities in their schools have a great significance in molding students' character or *akhlaq*²⁴.

²⁰ *Ibid.*

²¹ R. Hashim, *Educational Dualism in Malaysia*, Kuala Lumpur, The Other Press SDN. BHD., 2004.

²² Hashim and Langgulung, *Islamic Religious Curriculum in Muslim Countries: The Experiences of Indonesia and Malaysia*, cit.

²³ M.K. Hassan, *A Return to the Qur'anic Paradigm of Development and Integrated Knowledge: The Ulu Al-Albab Model*, «Intellectual Discourse», vol. 18, n. 2, 2010, pp. 183-210.

²⁴ Ab.H. Tamuri, *Islamic Education Teachers' Perceptions of the Teaching of 'Akhlaq' in Malaysian Secondary Schools*, «Journal of Moral Education», vol. 36, n. 3, 2007, pp. 371-386.

'*Ulum Shar-i'yyah* taught at higher level in IIEs focusing mainly:

1. Strengthening faith by cultivating students who are aware and conscious of his responsibility to God, self, environment, society and the nation.
2. Appreciation and practice of worship through knowledge and understanding of rules and disciplines of the worship determined by Allah.
3. Understanding the role of *Fardhu Ain* and *Fardhu Kifayyah* in the development of worship and also in building the nation and for one's well-being in this world and the hereafter.
4. Rebuilding a great Islamic civilization by taking lessons from the *seerah* of the prophet SAW²⁵.

Implications and conclusion

This paper presents the development of major aspects of IIE, such as pedagogy, curriculum, textbooks, teacher's training and assessment through the different ages till the present, based on available resources. This paper suggests in conclusion that the IIE still needs to be enhanced in terms of quality and quantity of the educational institutions and the teachers. In this regard, teachers must be adequately trained to be able to creatively integrate the teaching of the Muslim holy scripture, the «Quran» with science, and vice versa. Sometimes, Muslim community are not likely to accept such creative integration which ignores the principles of Islam in it. Islamic principle given by Allah (God) to humankind through revelation in the form of Al-Quran is absolute and preminent where acquired knowledge is relative and interdependent. In some instances, the contents and values associated with the scientific method contradict the essence and spirit of revelation. For that reason, the task of accommodating science to revelation is called integrated education. for example, integrating Islamic epistemological approach to curriculum of humanities, social sciences, sciences, technological and vocational subjects.

In doing so, acceptability of Islam among the Malay Muslims has an advantage. Islam has changed the way of life of Malaysian Muslims' and for that, Islam has become an accredited state religion of the country. Europeans colonized the country for a long period of time in the past, yet Islamic education flourished and developed in Malaysia. After independence, Islamic education was given priority in Malaysia that produced thousands of graduates of integrated Islamic educational institutions. This showed that the development of Islamic education in Malaysia was carried by the successive governments which have ensured the development of human capital. At present Islamic education can still be implemented in the light of the needs of the nation

²⁵ *Ibid.*

including developing some skills and attitudes among the graduates such as life-long learning and information management, communication skills, managerial and entrepreneurial skills, psychomotor / practical / technical skills, knowledge, social skills and responsibility and professionalism, values, attitudes and ethics²⁶. It must undergo substantial changes in pedagogy and curriculum.

²⁶ M.G. Mohayidin, T. Suandi, G. Mustapha, M.M. Konting, N. Kamaruddin, N.A. Man, S.N. Abdullah, *Implementation of Outcome-Based Education in Universiti Putra Malaysia: A Focus on Students' Learning Outcomes*, «International Education Studies», vol. 1, n. 4, 2008, pp. 147-160.

Schoolbook as an instrument of in-group cohesion and social integration: various strategies of intergenerational cultural transmission in the Latvian and the Polish primers and textbooks of Russian emigration in 1920s*

Maria Kozlova
Faculty of Social Sciences
Department of General Sociology
National Research University Higher
School of Economics
Moscow (Russia)
makozlova@yandex.ru

ABSTRACT: The article reviews a problem set of intergenerational cultural transmission through the example of primers, which were published for Russian-speaking children in Latvia and Poland in the period of 1920s. We compare the content of the alphabet books published in limitrophe states with the content of the alphabet books published in Soviet Russia at the same time, so as to reveal the particular nature and instruments of socio-cultural transmission in the communities of Russian-speaking minorities who found themselves in the actual emigration. Conceptual framework of research consists of culture typology by M. Mead and recent studies of intergenerational cultural transmission and social cohesion. Source base of conducted research consisted off three primers published in 1920s in Latvia and one primer published in Poland. In addition we reviewed two primers published within the same time frame in Soviet Russia. Model of intergenerational transmission in the analyzed Latvian emigrant primers is based on a child's urge to individual development of values and guidelines, testing of behavioral practices, etc., using means recommended by adult community, i.e. knowledge and education. Therefore, Latvian primers «allow» children to be included in network of weak ties, thereby loosening in-group cohesion, but preparing children for integration into dominant culture. In the Polish edition of primer for Russian-speaking children one can observe classic post figurative type of intergenerational cultural

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transmission. This «permanence» of conveyed values and illusion of stability homogenize community, both vertically and horizontally, and provide in-group cohesion, protecting the group as a cocoon from cultural diffusion and assimilation. In Polish textbooks this cohesion strategy is supported and strengthened by representation of external environment as hostile and in-group environment as stable, based on age-proven popular wisdom and support of superior, i.e. divine, essence. Content analysis of primers published in 1920s in Soviet Russia allows talking about reconstruction of postfigurative type of intergenerational cultural transmission. In the context of actual abruptness of cultural continuity the strategy of extrapolation of intrafamilial model to the society at large is used here. It enables to normalize current social transformations and legitimates established social hierarchy.

EET/TEE KEYWORDS: History of education; Primers; Intergenerational cultural transmission; Latvia; Poland; XXth Century.

The beginning of the 20th century was marked by the period of «culture wars» in Europe¹, when new foundations of nation states started to rival the previous basic principles of intra-European state structure and ethnic cultures. It is no coincidence that at the time passions ran high in regard to the possibility of inclusion of foreign culture and language in the content of school education. «Primer wars» escalated after the emergence on the European continent of «the second or even the first Russia» that left its homeland, one way or another. In the context of foreign culture environment a schoolbook, especially the one intended for elementary education, becomes an instrument of adaptation for the whole community by means of defining a «starting point» and creating a sort of lens through which new generations perceive and interpret multidirectional socio-cultural influences. The opportunity to define reality for the next generation is at stake on this “battlefield” because it is in the school where a child gets closer to or becomes estranged from the culturally-based worldview system and religion of his/her parents, adopts beliefs about the right and the proper that conform to or contradict the values communicated to him/her at home. Therefore, when groups that coexist in one political space differ in religion, language or nationality, school education inevitably turns into an object of immediate interest for each group, serving as a means of preservation of language, faith and traditions, and eventually becoming an instrument of integration for group and/or society as a whole. Values, perception patterns and norms of behavior, which are communicated through a schoolbook intended for cultural minorities, on the one hand, reflect, and on the other hand, define the strategies of group development in general²: orientation to assimilation

¹ C. Clark, W. Kaiser (edd.), *Culture Wars: Secular-Catholic Conflict in Nineteenth-Century Europe*, New York, Cambridge University Press, 2003.

² For details interaction and mutual influence of cultural and social structures see review: B. Steensland, *Moral Classification and Social Policy*, in S. Hitlin, S. Vaisey (edd.), *Handbook of*

or, on the contrary, cohesion in an attempt to preserve identity and culture of exodus, or orientation to complicated work on transformation of identity and norms of in- and out-group interaction in order to facilitate integration of group from a foreign culture minority into dominant society³.

By means of intergenerational cultural transmission society integration is performed in both diachronic, which implies children's adoption of values and norms of behavior of previous generations, and synchronic, which is based on intragenerational unity of value-based dispositions, dimensions. A schoolbook then becomes the most important instrument of intergenerational cultural transmission. That is why development and transformation of Russian language schoolbook publishing in the diaspora countries of the first wave of emigration period after 1917 are of interest for historians, sociologists, and representatives of applied branches of various social sciences, who are somehow involved in the work on integration of migrants into receiving community.

In this article we review a problem set of intergenerational cultural transmission through the example of schoolbooks for elementary education (alphabet books), which were published for Russian-speaking children in Latvia and Poland in the period of 1920s. Content analysis of primers is preceded by a brief historical note on the status of Russian-speaking community in the indicated countries during this period because consideration of socio-cultural context is essential for understanding of the norms communicated by schoolbooks. Further on, in the course of analysis we compare the content of primers published in Latvia and Poland with the content of textbooks intended for children of the same age, with the same goal of teaching reading and writing, and published in the same period of 1920s in Soviet Russia, in order to detect the particular characteristics of content and instruments of socio-cultural transmission in emigrant community. Finally, we summarize the results of our observations and attempt to include the obtained conclusions in the context of the modern studies of social cohesion.

the Sociology of Morality, Handbooks of Sociology and Social Research, Springer Science-Business Media, LLC, 2010, pp. 455-468.

³ See strategies of adaptation of foreign-culture migrants: assimilation, separation, marginalization, integration [J.W. Berry, *Social and cultural change*, in H.C. Trindis, R. Brislin (edd.), *Handbook of cross-cultural psychology*, Boston, Allyn and Bacon, 1980, vol. 5, pp. 211-279; J.W. Berry, U. Kim, T. Minde, D. Mok, *Comparative studies of acculturative stress*, «International Migration Review», vol. 21, 1987, pp. 491-511].

Russian schools in Latvia and Poland in the beginning of the 20th century: historical note

After the collapse of the Russian Empire four independent states were formed (Estonia, Latvia, Lithuania and Finland), Bessarabia merged with Romania, whereas the Kingdom of Poland became a part of the newly recreated Republic of Poland. Native Russian-speaking population lived in limitrophe states, and Russian-language schools were not traditional emigrant schools, but were notable for their centuries-old history.

In Latvia the golden age of Russian-language education occurred during the period of Empire; however, after the formation of independent state of Latvia political situation inside the country for some time was favourable to maintaining of Russian-language education. In 1920s Russians in Latvia possessed rights of cultural autonomy (Russian speech was heard in the Saeima, newspapers were published, Russian schools were open). On 8 December, 1919 the People's Council of Latvia passed *Latvian Educational Institutions Act* and *Latvian Organization of Schools for Minorities Act*. The latter provided to national minorities right for education, including secondary education, in native language; in other words, it provided right for school autonomy. In the beginning of 1920 under the Latvian Ministry of Education Russian, Polish, German, Belarusian and Jewish national departments were formed; these departments were in charge of the issues of school education of the corresponding national minority. By the end of the school year 1919/1920 there were 127 Russian middle schools and 12 secondary schools in Latvia. In the school year 1929/1930 there were 231 Russian middle schools and 11 secondary schools in Latvia⁴. One could also obtain higher education in Russian language; moreover, the work of Russian University Courses was financed from the state budget.

The status of Russian-language education in Poland was markedly different. Whereas before 1918 there were several thousands of primary and secondary schools on the territory of the Kingdom of Poland that formed part of the Russian Empire, starting from 1918 Polish government began to pursue the policy focused on gradual liquidation of Russian-language schools. Schools that wanted to teach on the basis of Russian education programs and in Russian language either got closed or became private. Private education was expensive; therefore, many parents preferred to send their children to Polish schools. Private school variety also assumed absence of right to issue school certificate, which in its turn deprived graduates of opportunity to obtain higher education.

Every year each school had to receive a license for its activities. This permit was granted by the government on the condition that during two years the school would switch to teaching in Polish language. Even Orthodox theological

⁴ V. Gushchin, *Sud'ba russkoj shkoly v Latvii* [The fate of Russian schools in Latvia], <<http://www.bilingual-online.net/>> (last access: 31.03.2017) (in Russian).

seminary was transferred to the status of government institution with Polish-language teaching. Overall, it resulted in reduction of students and subsequent shutdowns of Russian-language schools. During the period from 1922 to 1924 the number of educational institutions with teaching in Russian language dropped by more than one-half, from 52 to 21, by the middle of 1920s there were no higher schools, and there was only a small number of primary and secondary schools⁵.

Government policy of struggle with Russian-speaking population also affected religious life of the country; forced Catholicization of population ensued. In spite of the conditions of the Treaty of Riga and the Treaty of Versailles, as well as provisions of the Polish Constitution of 1921 that guaranteed freedom of religion, persecution against the Orthodox Church in Poland extremely intensified during 1920s: Orthodox churches and chapels were given to Catholic clergy, Orthodox monasteries were forcibly secularized, destroyed or closed.

Thus, cultural policy of Polish government shaped essentially different context of existence for Russian school in comparison with Latvia. However, even in Latvia the democratic solutions of the problems of national minorities' secondary and higher education that was characteristic for the third decade of the 20th century provoked objections from some radically-minded politicians. In 1925 an unsuccessful effort was made in order to change the education act and deprive national school of right for national autonomy. Nevertheless, in the beginning of 1930s national schools became the target of greater pressure. A. Kenins, who was then Latvian minister of education, and his supporters from the Party of democratic center insisted on switching the whole secondary education to Latvian language, but this initiative was met with strong opposition from all the national minorities, and in 1933 A. Kenins had to resign. However, from the beginning of 1930s the number of Russian-language schools was steadfastly reducing. After the coup d'état on 15 May, 1934 the status of national minorities substantially deteriorated. One of the first decisions of K. Ulmanis was liquidation of school autonomy. As early as in June 1934 new public education act was passed, the number of Russian-language schools decreased drastically; by the end of 1930s only two Russian state gymnasiums were left in the country: one in Riga and another one in Rezekne⁶.

Therefore, due to the fact that we discover the starkest contrast in the attitude toward the Russian-speaking community on the part of the dominant society in

⁵ A. Mikulenok, *Problema russkoj nacional'noj shkoly v Pol'she v 1920-e* [The Problem of Russian national school in Poland in the 1920s], «Theory and practice of social development», n. 15, 2015, pp. 105-109 (in Russian).

⁶ T. Fejgmane, *Russkaya shkola v Latvii (1918-1940)*, «Russkie Pribaltiki». Mekhanizm kul'turnoj integracii (do 1940 g.) [*Russian school in Latvia (1918-1940)*, in «*The Russians of Baltic*». *The mechanism of the cultural integration* (up to 1940)], Vilnius, 1997, pp. 129-138 (in Russian).

Poland and Latvia, in particular during the third decade of the 20th century, we will focus on this period for the purpose of this article. We believe that content analysis of schoolbooks which were published in such different socio-cultural contexts allows to specify some aspects of intergenerational cultural transmission theory, as well as to detect similarities and peculiarities in socio-economic, socio-legal and cultural status of Russian-speaking population in these countries and strategies of preservation or transformation of cultural identity.

Strategies of intergenerational cultural transmission in the primers and textbooks published in Latvia, Poland and Soviet Russia

Source base of conducted research consisted off three primers published in 1920s in Latvia and one primer published in Poland:

- I. Davis, *Novaya russkaya azbuka. Obuchenie chteniyu, pismu i razgovornoy rechi po naglyadno-prakticheskomu metodu*. [New Russian primer. Teaching of reading, writing and informal speech by the practical and visual method] Riga, Valters un Rapa, 1923.
- A. Selunskiy, *Veselyj bukvar' dlya derevenskih detej* [Joyful primer for village children] Riga, Valters un Rapa, 1927.
- N. Gudkov, *Naglyadnyj russkij bukvar' po novej orfografii* [Russian visual primer on the new spelling], Riga, N. Gudkov's Book Publishing, 1929/1930.
- K.M. Kirillov, *Russkaya azbuka v kartinkah* [Illustrated Russian primer], Warsaw, 1930.

In addition to these books we reviewed two primers that were published within the same time frame in Soviet Russia:

- P.P. Mironosickij. *Slovechko. Knizhka dlya obucheniya gramote* [Good word. A book for teaching of reading and writing.] 4th ed., rev. and corr. Leningrad, E.V. Vysockij's Seyatel', 1924.

Intended for the first teaching of reading after alphabet books, but still a «primer»:

- I. Sverchkov. *Pioner. Detskij bukvar'* [Pioneer. A primer for children] Leningrad, Gosizdat, 1924.

Obtained results and their discussion

In the course of analysis of illustrative and text content of the primers published in 1920s in limitrophe states for Russian-speaking children we review two key aspects that allow us to form an opinion of the nature of intergenerational cultural transmission and patterns of community cohesion: what values are communicated to children by pedagogical community and who exactly is represented by the schoolbook as a bearer of these values; i.e., whom the schoolbook advises a child to listen to and when.

The members of the older generation, such as parents and teachers, are almost absent in Latvian textbooks. A child is quite self-sufficient, both in a home space: «At school and at home. I wake up early. I get dressed and put on my shoes. I eat and then I go to school. At school I read, draw, play, sing. It's fun to be at school»⁷, and at school, in particular during the teaching activities: «At school. I write. Yasha draws. Katya sings. Varya eats apple. Kolya and Azya are naughty. The bell rings and everybody sits still»⁸. The bell, as a universal impersonal force, becomes an external factor that organizes children's activity.

When adults appear in the text of the schoolbook, they act in one of three capacities:

1. As a context of child's life, deprived of voice and other means of will declaration and influence on the younger generation: «Our family. I have father, mother, sister, grandfather and grandmother. In the morning father goes to work, mother stays at home and cooks dinner, cleans rooms and repairs clothes. Grandmother knits stockings and looks after my little sister. Grandfather is very old and weak. He can't walk a lot that is why he mainly sits by the window and reads a book»⁹.
2. As an object of care. For example, in the first part of the primer, where child gets acquainted with letters and is taught syllabi reading, on the page with the letter D one can see the word "ve-dyot" [leads] illustrated by the following picture: a boy leads an old man who experiences difficulties with moving by himself and for this reason the man leans on the boy's shoulder¹⁰. On the page with the letter [...] Short I/Yot there is a short text "Nishchij" [Beggar]: «A beggar came. He was pale and hungry. The beggar knocked on the window. I gave him my kaftan and a loaf of bread»¹¹. The accompanying illustration depicts a man with a long grey beard and a stick. Apparently the hero of this text is not a child; in that

⁷ N. Gudkov, *Naglyadnyj russkij bukvar' po novoj orfografii* [Russian visual primer on the new spelling], Riga, 1929/1930, p. 36 (in Russian).

⁸ *Ibid.*, p. 26.

⁹ *Ibid.*, p. 57.

¹⁰ *Ibid.*, p. 24.

¹¹ *Ibid.*, p. 39.

case his kaftan would be rather small for the beggar. However, given the fact that this narration is told from the first-person point of view, one can assume that that this text communicates such pattern of care that children should perform in relation to the needy, including adults. Therefore an adult in the provided examples and in the primer in general doesn't act as independent, strong and in charge, but rather as dependent and waiting for a patronizing support. This pattern is strengthened and reinforced by the following context of adult representation.

3. As an object (!) of cultural transmission, recipient of norms and knowledge communicated by the child: «A letter. Fedot received a message from grandson: his grandson lives far away in the city. What writes grandson, grandpa needs to know; but he can't read it by himself. A boy goes down the road near to the village. Grandpa cries: 'Mishuha, here, read this!'»¹²; «Kolya and mother. Kolya came from school. Mother was at home and was sewing a shirt. 'Read a book, Kolya!', says mother. Kolya read a fairy tale. Mother was glad»¹³. Therefore, the child is represented as a bearer and source of knowledge.

Knowledge is power and sacralization of this exclusive knowledge is performed through proverbs and admonitions included in the primer: «Knowledge is light, ignorance is darkness»¹⁴, «Read a lot, walk a little»¹⁵, «Learning will always come useful»¹⁶. The only found example of an evident intergenerational transmission also communicates the value of knowledge: «Glasses for children. A boy says to his father: 'Dada, buy me glasses, I want to read books like you' – 'All right', answered father: 'I will buy you glasses, but for children'. And father bought the boy an alphabet book»¹⁷.

Therefore, the main value that is actively and clearly communicated by the textbooks for Russian-speaking children in Latvia, i.e., the value of knowledge/education as it is, is represented in the reviewed textbooks as an instrumental value¹⁸. The set and hierarchy of terminal values, target values, are left by the author of the primer to the decision of not even the child's immediate circle, but rather to the decision of a child him/herself: «a child will receive an education and after that, owing to this education, will find out what is wrong and what

¹² *Ibid.*, p. 46.

¹³ *Ibid.*, p. 42.

¹⁴ *Ibid.*, p. 35.

¹⁵ *Ibid.*, p. 39.

¹⁶ A. Selunskij, *Veselyj bukvar' dlya derevenskih detej* [A fun ABC book for children of the village], Riga, 1927, p. 31 (in Russian).

¹⁷ I. Davis, *Novaya russkaya azbuka* [The New Russian alphabet], Riga, 1923, p. 36 (in Russian).

¹⁸ We came across one more case of value transmission: «My brother says to me: 'it's a sin to take other people's things'» [Gudkov, *Naglyadnyj russkij bukvar'*, cit., p. 37]. One can see that in this case an instrumental value of honesty is communicated and the bearer of this value is the member of the same generation, this is horizontal transmission.

is right by him/herself». Knowledge obtained and occasionally monopolized by the younger generation acquires a sacred status in Latvian textbooks.

In the Primer published for Russian children in Poland we observe an essentially different situation in comparison with Latvian textbooks. The differences involve three aspects.

First of all, parents – mother and father – appear on the pages of the primer as soon as a child gets acquainted with the letters from which one can compose these words: they open the first two pages where the child is provided with the list of words for syllabic reading. Mother becomes a key character for the whole theme which includes two texts and a proverb: «there is no such a friend as mother: by day she is my sympathizer, by night she is night worshipper»¹⁹. It is important to note that in the quoted proverb, as well as in the both texts, mother acts as a protector and a guarantor of child's well-being in the world which is in general dangerous and hostile for him/her: «It's bad without mother. Misha dropped in the neighbor's house. It's bad in his home. Children are filthy, with dirty shirts on, with unkempt hair. Small children are lying on the floor, the other two are fighting and the eldest one is ill in the bed and there's nobody to look after him. At that moment, Misha remembered that neighbor's wife recently died and also remembered his own mother: he ran back home and hugged tightly his mommy»²⁰.

The second aspect that defines the core of the differences between the content of the Primer published in Poland and the content of Latvian textbooks is the place and role of divine and sacred in the texts and illustrations included in the textbook. In the very first basically primer part we see A as Angel and C as Church, while the word «faith» can be found among the first words²¹. Divine Spark is present in each thing that supports human being and brings him/her joy: labor («With a quiet prayer I will plough and sow. Grant me, Lord, a good crop, Breadcorn is my wealth!»²²), beauty of nature, good relationships with the people around you. As we saw, mother's care is also introduced together with God's help. In the following texts this connection is reinforced: good deeds performed by adults with regard to a suffering child are presented as God's interference. For example, C.A. Peterson's poem included in the textbook, where an orphaned baby is sheltered, warmed and fed by an old woman, ends with the following verse: «God feeds birdie in a field, Sprinkles dew on flower, Homeless orphan He won't leave In the darkest hour!»²³.

¹⁹ K.M. Kirillov, *Russkaya azbuka v kartinkah* [Russian alphabet in the pictures], Warsaw, 1930, p. 37 (in Russian).

²⁰ *Ibid.*, p. 38.

²¹ *Ibid.*, p. 26

²² Abridged poem *Ploughman's Song* by A.V. Koltsov in Kirillov, *Russkaya azbuka v kartinkah*, cit., p. 50.

²³ Kirillov, *Russkaya azbuka v kartinkah*, cit., p. 40.

By the way, it is worth noting that in the Polish edition for Russian-speaking children address to grim, scary and wrenching topics, such as death, orphanhood, poverty, is not uncommon. These topics are actualized both in the initial sections, where a child is given words for syllabic reading («be-da» [trouble], «po-zhar» [fi-re]), and in the text section, in the abovementioned texts *The Little Orphan, It's Bad without Mother*, as well as in the tale *The Old Man and the Death*²⁴. According to the typology of mentionings of death in primers suggested by A. Lyarskij, examples that we found in the Primer of Polish edition could be identified as “didactic” type: «Death in the family becomes a source of suffering and disaster for children who are left without relatives’ support, but at the same time turns into a chance for people around to show kindness, pity, compassion and mercy»²⁵. This admonition communicated by the Primer edited in Poland in 1920s is essentially important. As all the specified features, characteristic for the schoolbooks of Polish edition, mentioning of death and other tragedies and troubles, which a child experience or may experience, serves for consolidation of the Russian-speaking community.

The third noteworthy aspect is the abundance of proverbs included in the Primer by K.M. Kirillov. Here proverbs are used as the first phrases for independent reading in the section that follows the primer and precedes the texts. They are not separated by any typographic means and are interspersed with phrases that contain no value orientations, as, for example in the following block: «Masha salted porridge. Learning is not pain. Bring us raspberries. Our cats have eaten flatbreads. One’s own home is like mother. Race a horse with oats, not with whip. Good won’t die and evil will perish»²⁶. Proverbs included in the Primer address the topic of labor («No song, no supper», «Don’t rush with your tongue, rush with your deeds»), attitude towards people around, hospitality («The glory of a house is its hospitality»), friendship («Be slow in choosing a friend, but slower in changing him», «Never forget good turns, but forgive the evil done to you»), and also communicate instrumental values of self-restraint («Least said is soonest mended», «Think today and speak tomorrow»), shrewdness («You reap what you sow», «What goes around comes around»), frugality («Many a little makes a mickle», «Money to spare likes good care»), education («Knowledge is light, ignorance is darkness»)²⁷.

Therefore, the textbook published in Poland completely reproduces orientations and strategies of postfigurative culture, according to M. Mead’s terminology: formation of values and behavior models of the younger generation appears as a result of direct unilateral actions and deeds of their parents²⁸. In

²⁴ *Ibid.*, p. 43.

²⁵ *Ibid.*, pp. 237-238.

²⁶ *Ibid.*, p. 27.

²⁷ *Ibid.*, pp. 27-32.

²⁸ M. Mead, *Culture and commitment. A study of the generation gap*, Garden City, Natural History Press, 1970, <<http://www.countries.ru/library/texts/mid.htm>> (last access: 01.04.2017).

such a case, a child becomes a passive recipient of the “cultural baggage”, while the process of transmission reduces to automatic copying²⁹.

In Latvian schoolbooks, on the contrary, one can observe a combination of elements of configurative and prefigurative cultures. Prefigurative type of cultural transmission, in which adults and older generations can learn and are learning from their children, adopt some more modern behavior models, could be clearly detected in the given examples, where members of the older generation seek help from a child as a bearer of special knowledge, i.e., literacy.

Succession that characterizes configurative type of culture is notable by the fact that both adults and children equally well can adopt patterns of behavior from their peers³⁰. It is the communication of such model that we mostly detect in the primers for children of Russian-speaking population in Baltic states: child characters of the texts are surrounded by peers with the same native language and primarily interact with the members of their generation. In general, this model of culture is inherent not only to emigrants, but also, as noted M. Mead, to societies that undergo industrialization stage: members of such societies obtain new information from their peer partners, develop innovations and novelties, and propel society to the next level. Theoretical connection of configurativeness with industrialization prompted us to perform content analysis of the primers published in 1920s in Soviet Russia.

In the primer for small children that was published by prerevolutionary teacher with taking into account transformation of the previous life circumstances into the contexts of the new regime we find a morning situation similar to the one that was presented in the Latvian primer. A child is getting ready for school: «Grandmother woke Masha up: ‘It’s time, Masha! It’s time, dear, to go to school!’ Masha got dressed quickly. Grandmother gave a hot flatbread and a cup of milk. Masha ate her meal and went to school»³¹. We see here a decidedly different situation: a child is tended to by an adult who takes responsibility both for child’s well-being and successful performing of child’s duties. At school a child is met by an equally caring adult whose professional duties suggest communication of values and norms of behavior, pedagogical “reduction of individual noise”:

I remember how a bag was sewn for me and I was sent to school for learning. My grandmother went with me. She told the teacher:

- ‘Here, my dear, teach my little darling. He is a smart boy but a noisy one’.

- ‘Never mind, - said the teacher, - smart is enough and noise we can quiet’.

And she showed me where to sit on the bench³².

²⁹ D. Barni, S. Ranieri, E. Scabini, R. Rosnati, *Value transmission in the family: do adolescents accept the values their parents want to transmit?*, «Journal of Moral Education», vol. 40, n. 1, 2011, pp. 105-121.

³⁰ *Ibid.*

³¹ P.P. Mironosickij, *Slovechko. Knizhka dlya obucheniya gramote* [Word. Book for learning to read], Leningrad, 1925, p. 76 (in Russian).

³² *Ibid.*, p. 78.

One can compare this text with the extracts from the Latvian primer quoted above. In that primer a child gets ready for school being completely alone and at school he/she learns reading and writing surrounded by similarly lonely children. The only behavior regulator turns out to be an impersonal formal signal (bell) serving as law under which everybody is equal, regardless of individual and social (familial, class, ethnocultural, regional, religious) peculiarities and attributes. Therefore, while in Latvian primers a child is removed from the primary groups (family) to the world of secondary groups and institutionalized impersonal relationships, in Soviet primers he/she stays rooted in the primary, i.e., familial or similar to familial, interactions, and it's not a coincidence.

In the primers published in 1920s in Soviet Russia a child surrounded by adults practices characteristic types of activity, taking part in the working process and performing doable functions: «In summer we lived at granddad Pahom's house. We worked with granddad at hay cutting. I wasn't strong enough for that work but I also had pitchfork»³³; mimicking working practices performed by adults who directly contact with the child (as a rule, connected with him/her by blood ties): «Children were in granddad Ivan's house. They saw granddad's nets. Granddad Ivan's children are fishers. Granddad had nets and fishing rod. Children threw the rod and sat»³⁴.

In the given examples one can find again manifestations of cultural transmission of postfigurative type. At first sight this "outbreak" of postfigurativeness in the culture of industrial society that just recently experienced massive political and socio-cultural disruptions is bewildering. However, it is the massiveness of occurred transformations that explains actualization of quite archaic forms of cultural transmission: complexity and unpredictability of the real events in tumultuous times is overshadowed by replication of everyday stable events, and thus dramatic effect is completely erased, «events that should be related to unusual surroundings... take the familiar forms in memory»³⁵.

The tragic and the indeterminable is supplanted³⁶, only the sublime remains: «steady apodictic feeling of one's speciality, all-permeating realization of rightness of any life aspect, characteristic for postfigurative cultures, could appear and could be reconstructed on any level of culture of any complexity»³⁷.

³³ *Ibid.*, p. 48.

³⁴ *Ibid.*, p. 32.

³⁵ Mead, *Culture and commitment. A study of the generation gap*, cit.

³⁶ Sensitive and scary topics disappear from the primers of the first Soviet decade: poverty, orphanhood, illness, death; these topics were present in the prerevolutionary and emigrant primers: see A.B. Lyarskij, «Vot ya! Zachem zval?»: *smert' v bukvaryah i knigah dlya chteniya v Rossii dlya nachal'nogo chteniya v Rossii konca XIX — nachala XX v.*, *Nachalo ucheniya detyam: rol' knigi dlya nachal'nogo obucheniya v istorii obrazovaniya i kul'tury*. [*"Here I am! What was the matter?": the death in the primers and readers for the initial reading in Russia in the late XIX — early XX century*, in *The Beginning of exercise for children: the role of the books for primary education in the history of education and culture*], Moscow, 2014, pp. 231-254 (in Russian).

³⁷ Mead, *Culture and commitment. A study of the generation gap*, cit.

Let's focus on the strategies for society consolidation that are realized in the Soviet primers. Here the elder members of primary social groups also become child's guides to the broad ideologically charged social environment, in the meantime always staying with him/her through actions and objects, providing his/her connection to primary group of blood relations. At the same time a child provides their connection with the environment; through the correct use of right gift he/she legitimates adults' loyalty, granting them the status of «proper citizens»:

The drum.

Uncle Ivan bought a drum on the market and gave it to Vasya.

Vasya put the drum on, went outside, started singing a song, while beating on the drum:

That's us, that's us,

We're pi-o-neers!

We're young, but we are

Revo-lu-tio-na-ries!

Our Vasya is a pioneer. He's got a scarlet band on his shirt³⁸.

In such a way a slightly older, or rather more prepared (who learned the ropes of elementary [political] science), child enters into denser transmission flow. Apart from the members of primary groups, society as a whole becomes a bearer of values and patterns of behavior. One can also see gradual changes in “transmission straps”, i.e., forms and instruments of value transmission. Not only adult family members but also symbolic forms play a direct role in child's life and engage him/her to participate in the working activity:

We came to the classroom and saw a new big framed portrait on the wall with red and black ribbons around the frame.

The teacher said to us:

– Look, children: This is LENIN'S portrait. Vladimir Ilyich Lenin was a friend of working people. And you, be friends of worker and peasant!

We stood up and everybody said loudly:

– ALWAYS PREPARED!³⁹.

In the primer intended for children of older age one can observe the same logic of narration: first of all, the fact of intergenerational succession is stated («Our city stands on river. There is a plant on the shore of our river. Our river is called Neva. Even our grandfathers lived on it»⁴⁰) and a child's place in this vertical structure of cultural reproduction is defined («Masha and Misha lived at the plant. There are houses and cabins at the plant. Misha's father is

³⁸ Mironosickij, *Slovechko*, cit., p. 71.

³⁹ *Ibid.*, p. 83.

⁴⁰ I. Sverchkov, *Pioner. Detskij bukvar'* [Pioneer. A children's primer], Leningrad, 1924, p. 17 (in Russian).



Pic. 1. *Our revolution*⁴⁵

at the plant. And Misha's mother is at the plant. Misha and Masha are little»⁴¹; «Petya and Sima are pioneers. Petya and Sima have a work. Petya and Sima worked. Petya and Sima are workers' children. Petya and Sima's mother and father are workers. Their father is a worker»⁴²). Further on, representation of grandfathers' and fathers' experience as a model of life for children becomes a foundation for forming of intergenerational cultural transmission line: «We are pioneers, workers' children. Young pioneers. Young revolutionaries. Workers' children»⁴³. Children are united as one whole “We” with the “heroes of revolution”: «We had a revolution. Before the revolution we were slaves. We worked for the rich. Our plants were their plants. Our houses were their houses. We were slaves. We lived like slaves. 8 years have passed since we are not slaves. Plants are ours. We are sated, have shoes and clothes. We feel good». On the accompanying illustration (dwg. 1) one can see a demonstration of workers, where among other mottos there is one that reads «Children are our future», and this future walks in the forefront: the future of children is represented as continuation of their grandfathers' and fathers' fate, but now they are introduced as a force that is generalized in abstract concept: «We, young pioneers, are children of revolution»⁴⁴.

Afterwards, the vertical structure of cultural transmission is specified and hierarchized:

Our posters.

Those are our posters.

Always forward!

Pioneers take over from Komsomol members and communists.

We, pioneers, are young revolutionaries.

Pioneers are children of working people [...]

Pioneer is faithful to the cause of the working class and Ilyich's legacy. Pioneer is a younger brother and helper of Komsomol member and communist⁴⁶.

⁴¹ *Ibid.*, p. 11.

⁴² *Ibid.*, p. 38.

⁴³ *Ibid.*, p. 29.

⁴⁴ *Ibid.*, p. 30.

⁴⁵ *Ibid.*, p. 21.

⁴⁶ *Ibid.*, pp. 89, 97.

Through the family categories, such as «children» and «younger brother», blood tie unity is actualized again and the process of transmission acquires the form of direct transfer of behavior patterns from ancestors to descendants.

Intergenerational cultural transmission in different cultural contexts: succession and interruptions

Intergenerational cultural transmission is an important basis of social stability. Due to its connection between different generations is maintained, culture-specific knowledge and beliefs are preserved and behavior models are reproduced⁴⁷. After the content analysis of the primers published in the same period but in different socio-cultural contexts we detected three types of strategies of vertical (intergenerational) cultural transmission.

The first type is a classic postfigurative type that represents transfer of cultural traditions in the intact form from older generations to younger. We find it in the schoolbook published in Poland for Russian-speaking children. Texts included in the schoolbook largely replicate the content of Russian prerevolutionary primers, with original cautionary tales and folklore material, such as proverbs. This “permanence” of conveyed values and illusion of stability homogenize community, both vertically and horizontally, and provide in-group cohesion, protecting the group as a cocoon from cultural diffusion and assimilation. Representation of the external environment as hostile in these schoolbooks becomes the first stage in the development of Russian people cohesion strategy. If we list all these stages one by one, we observe the following picture: an image of hostile and dangerous environment is created, with insiders as a relative guarantee of well-being. In this case, insiders are the people who have blood ties to a child, i.e. family, and in a broader circle they are compatriots, members of Russian community. This transition from blood ties to cultural ties is performed through the inclusion of Divine Spark in the Primer. Considering persecution against the Orthodox Church in Poland during the historical period in question, resort to God in the schoolbook’s texts becomes rather powerful instrument of cohesion. In the world full of ill-wishers, where child’s well-being depends only on blood relatives, but where these relatives are also under threat, there is nobody to trust in other than God. Here one can see the complete implementation of E. Durkheim’s ideas about the essence and functions of religion: religious beliefs are collective and the notion that grants religion the role of connecting and forming element of the whole human life is not the one about religion as an abstract idea, but rather as participation

⁴⁷ U. Schönplugg, *Intergenerational transmission of values: The role of transmission belts*, «Journal of Cross-Cultural Psychology», vol. 32, n. 2, 2001, pp. 174-185.

in social life that takes place on its basis. That is why religious beliefs and actions are social life itself. Authority and power of religion are authority and power of society, intensity of religion reveals the principal aspect of social life. Religion is a society itself; it is the center of the social aspects that possess the quality of sacredness. Hence the almost infinite influence of religion on culture, personality and the main principles of human thinking as well⁴⁸.

Thus, by means of construction of external environment as hostile and in-group environment as stable the grounds for social cohesion in both synchronic and diachronic aspects are formed. Intergenerational cohesion is also reinforced by the noted communication of “ancient wisdom”: an abundance of value-charged statements and proverbs that were included in the Primer with an obvious methodological goal of training the skills of composing words from letters and phrases from words, as well as a latent didactic goal of constructing a vertical structure of cultural succession and imbuing the new generation with wisdom of the previous one.

The content analysis of the primers published in 1920s in Soviet Russia reveals a seemingly paradoxical situation: despite the actual interruption of cultural succession as a result of fundamental changes of life circumstances in the country, the primer represents postfigurative type of intergenerational cultural transmission, whereas intrafamilial intergenerational model is extrapolated to the society in general. On the one hand, it permits to normalize already happened and still happening transformations (through the adoption of everyday practices of average actors), on the other hand, it legitimates established social hierarchy (through its likening to intrafamilial structure). Therefore, construction of model of cultural transmission in public (pedagogical) discourse also quite successfully performs stabilizing function, creating illusion of reproduction of previous (intrafamilial, domestic, everyday) channels of transmission, in fact, filling them with ideologically charged content. One way or another, connection between generations is shown and stated as preserved and even reinforced.

The model of intergenerational transmission represented in Russian-Latvian primers substantially differs from these models. In families of migrants and ethnic minorities the degree of similarity between values of parents and children theoretically should differ from the degree of similarity between values of parents and children in majority groups. In the case of migrants and ethnic minorities it is important to understand that both children and parents are involved in the process of acculturation⁴⁹; experience obtained by them is not always the same and they are not always oriented to the same reference groups. Goals of migrant parents and children in the new cultural environment could be

⁴⁸ YU.N. Davydov, *Istoriya teoreticheskoy sociologii* [History of the theoretical sociology], Moscow, RAS, 2015, p. 276 (in Russian).

⁴⁹ P. Vedder, J. Berry, C. Sabatier, D. Sam, *The intergenerational transmission of values in national and immigrant families: The role of zeitgeist*, «Journal of Youth and Adolescence», vol. 38, n. 5, 2009, pp. 642-653.

different⁵⁰. In view of this, additional value differences could emerge between migrant children and their parents, apart from those that appear as a result of imperfection of socialization process⁵¹. In Latvian textbooks for Russian-speaking minority a child apparently doesn't need protection and constant care⁵², he/she is quite emancipated and is encouraged by adult community to individually develop values and guidelines, test behavioral practices, etc., using means recommended by adult community, i.e. knowledge and education. Therefore, we observe institutionalization of intergenerational interruption: parents, whose cultural values and developed behavior patterns could become irrelevant to new conditions, recede into the background, their influence on the younger generation is minimized. As shown above, the value of education becomes the only indisputable cultural value; however it doesn't restrict goals that are probably vague to adults themselves, but just defines means for achieving the goals that children are advised to find on their own in the new socio-cultural environment. It is likely that intergenerational transmission of values shouldn't be always perceived as undoubtedly adaptive phenomenon because on the course of social changes younger generations more often face new difficulties and tasks to which "old" decisions doesn't correspond⁵³. Significant similarity between values of parents and children in the majority's families indicates successful adoption of social values, whereas in families of migrants and ethnic minorities integrative potential of the next generations could increase as the distance from the values of their parents and grandparents grows.

Therefore, cohesion patterns conveyed by the primers of 1920s have different vectors intended for solution of different tasks: closing inside cultural linguistic enclaves and lowering of their walls for successful integration. Primers for Russian-speaking children published in Poland focus their efforts on the struggle against denationalization of Russian children, consolidate the community of Russian emigrants in resistance against dominant culture through actualization of "strong" blood ties. Latvian primers, on the contrary, allow children to be included in network of weak ties, thereby preparing children for integration into dominant culture of the host society. In this article we reviewed both types and compared them with the situation in new Russia.

⁵⁰ *Ibid.*

⁵¹ J.S. Phinney, A. Ong, T. Madden, *Cultural values and intergenerational discrepancies in immigrant and non-immigrant families*, «Child Development», vol. 71, n. 2, 2000, pp. 528–539.

⁵² See the first section of the article where we describe friendliness of the host population towards minorities and prosperity of Russian schools during the period in question.

⁵³ I. Albert, G. Trommsdorff, L. Wisnubrata, *Intergenerational transmission of values in different cultural contexts: A study in Germany and Indonesia*, in A. Gari (ed.), *Quod erat demonstrandum: From Herodotus ethnographic journeys to cross-cultural research*, Athens, Pedio, 2009, pp. 221-230.

The 'emulators' of Samuel Smiles: Self-Help literature in Italy during the 19th Century

Roberto Sani
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
roberto.sani@unimc.it

ABSTRACT: Based on a wide and deep analysis of the vast and articulate journalism of a self-helpist line appearing in the peninsula following the publication in the Italian language of Samuel Smiles's famous essay *Self-Help* (1865), the article focuses on significant differences that can be seen, from the point of view of the socio-economic and political orientations and of the cultural and formative models transmitted, among this journalism, which in Italy soon assumed the most correct definition of «proletarian» journalism, and the original «self-helpist» ideology of an anglo-saxon origin advocated by the Smiles essay.

EET/TEE KEYWORDS: History of education; Children's literature; Self-Help literature; Italy; XIXth Century.

1. «*Heaven Helps those who help themselves*»: the publication of the *Self-Help* (1865) and Samuel Smiles's *Fortune in Italy*

Within the rich and varied journalism for childhood and youth published in Italy in the second half of the nineteenth century, a very important role played a number of lucky works attributable to the so-called self-helpist current (or proletarian, according to the peculiar titling assumed in the peninsula)¹, so

¹ See F. Chabod, *Storia della politica estera italiana dal 1870 al 1896. Le premesse*, Bari, Laterza, 1951, pp. 348-366; G. Are, *Il problema dello sviluppo industriale nell'età della Destra*, Pisa, Nistri

called by the reference to the famous *Self-Help*², the text of the journalist and writer of Scottish heritage Samuel Smiles (1812-1904)³, designed to constitute the first and most significant example of this kind of publications.

Translated into Italian in 1865 by Gustavo Strafforello and published in the «Biblioteca Utile» («Useful Library») by the publisher from Milan Emilio Treves, titled *Chi si aiuta Dio l'aiuta ovvero storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività*⁴, Smiles' *Self-Help* was a great success in the peninsula, proved on the one hand by frequent reprints and re-editions (the work, which came to the 57th edition in 1898⁵, would be reprinted till the end of 1920⁶), on the other hand, by the spread of a massive journalism of a youth and popular front largely inspired by this text. This is due to Italian writers of different political and cultural orientation and variously characterized by the literary quality and the validity and effectiveness of the ideological and educational contents transmitted⁷.

Samuel Smiles and his *Self-Help*'s fortune in Italy are part of the special socio-economic and cultural conditions created in the peninsula after the accomplishment of the unitary process:

Lischi, 1965, pp. 115-165; G. Baglioni, *L'ideologia della borghesia industriale nell'Italia liberale*, Torino, Einaudi, 1974, pp. 308-365; S. Lanaro, *Nazione e lavoro. Saggio sulla cultura borghese in Italia (1870-1925)*, Venezia, Marsilio, 1979; M. Berra, *L'etica del lavoro nella cultura italiana dall'Unità a Giolitti*, Milano, FrancoAngeli, 1981, pp. 121-168; G. Verucci, *L'Italia laica prima e dopo l'Unità 1848-1876*, Roma-Bari, Laterza, 1981, pp. 116-138; A. Chemello, *La biblioteca del buon operaio. Romanzi e precetti per il popolo nell'Italia unita*, Milano, Unicopli, 1991; Ead., *Libri di lettura per le donne. L'etica del lavoro nella letteratura di fine Ottocento*, Alessandria, Edizioni dell'Orso, 1995.

² S. Smiles, *Self-Help: with illustrations of conduct and perseverance*, London, J. Murray, 1859.

³ See Th. Mackay (ed.), *The Autobiography of Samuel Smiles*, LL.D., New York, E.P. Dutton and Company, 1905; T. Travers, *Samuel Smiles and the Victorian work ethic*, New York, Garland, 1987; and A. Jarvis, *Samuel Smiles and the Construction of Victorian Values*, Stroud, Sutton, 1997.

⁴ *Chi si aiuta Dio l'aiuta, ovvero Storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività, di Samuele Smiles, tradotto dall'originale inglese da Gustavo Strafforello*, Milano, Treves, 1865.

⁵ *Chi si aiuta Dio l'aiuta, ovvero Storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività, di Samuele Smiles, nuovamente recata in italiano, sull'ultima edizione inglese, con autorizzazione dell'autore, da Cesare Donati, 57ª edizione italiana con numerose aggiunte*, Milano, Treves, 1898.

⁶ S. Smiles, *Chi si aiuta Dio l'aiuta. Traduzione di Cesare Donati*, Milano, Treves, 1929.

⁷ See 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. 49-100; G. Di Bello, *La pedagogia del self-help di Samuel Smiles e dei suoi imitatori italiani: Da «chi si aiuta Dio l'aiuta a chi si contenta gode» (1865-1890)*, in G. Di Bello, S. Guetta Sadun, A. Mannucci, *Modelli e progetti educativi nell'Italia liberale*, Firenze, Centro Editoriale Toscano, 1998, pp. 19-142; R.S. Di Pol, *Istruzione popolare e self-helpismo nel tardo positivismo piemontese*, in G. Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, Brescia, La Scuola, 2000, pp. 321-334.

In the decades followed by the political unification and in which there are the requirements of creating an industrial economy – said Guido Baglioni – Italian professionals and writers who advocate the opportunity of economic expansion often refer to the situations of other countries, of course, of the most advanced countries, and recall the ideologies that are expressed in them to support the industrialization and action of its protagonists. In many cases, the recalls are episodic. [...] Perhaps the only exception we know about this situation is the widespread diffusion of self-help literature, that - initially in Great Britain and then in the United States, in the second half of the nineteenth century – has had a place of great importance in affirming the virtues and merits of entrepreneurs and more concretely, has supported the will of the ruling classes to propose a convincing and stimulating message to the middle classes and to the working class that ensured respect for the laws and full membership to the logic of the capitalist economy⁸.

The ideology carried by Smiles' Self-Help is based on a series of postulates, first of all, the «success in the various fields of human activity, and especially of the economic-productive one, is simply due to the good will and hard work»: modern capitalist society in this regard «makes available to all men the means and conditions to positively lead the way of economic success and social prestige». The entrepreneurial ideology advocated by Smiles, therefore, not only exalts the merits and capabilities of the industrialization supporters and of an economic and social progress in capitalism, but claims the possibility for everyone, regardless of the social starting condition and the belonging class, to aim for wealth and success, and build your own fortune:

In America – emphasized Guido Baglioni – the meeting of Smiles's pedagogy with other more solid orientations (spencerism, darwinism, etc.) [...] certainly contributes to the affirmation of the prevailing ideology, based on the values of the equivalence of wealth-virtue, the success of the most capable, and the full legitimacy of great fortunes. [...] Smiles proposes a «message» that involves the person of modest origins and professions in the area of success and social and economic growth. He breaks the rigid distinction between those who occupy high and rewarding positions and all others; he leaves open the road to success for those belonging to different social classes; he passes from the pessimistic and punitive perspectives towards humble people to a prospect that contemplates a strong dose of optimism for everyone⁹.

The topics and purposes, the ones recalled here, which were destined to be resumed and declined according to an exquisitely pedagogical and educational perspective in the *Prefazione alla prima edizione italiana* of Smiles' work in which it was stated:

The author of this precious book believes that neither the laws, nor the institutions, the schools, or the books are sufficient to raise the level of a society without the free and persevering competition among individuals. Everything helps man, but he must begin to help himself. What kind of external power will ever change a lazy man into a productive

⁸ Baglioni, *L'ideologia della borghesia industriale nell'Italia liberale*, cit., pp. 309-310.

⁹ *Ibid.*, p. 313.

worker? Those who always turn their gaze to the government to have their welfare, moral light and their future, invoke with stolid idolatry a force, which, on the contrary, receives its incitement from individual sovereignty. The providence of the nations does not reside in those who govern it: it is in the will of each person. [...] Even to arts, sciences and literature, Smiles finds the source of success in the heroic efforts of individuals and the power of work. Not that he denied genius and vocation. However, according to him, these innate dispositions remain sterile without the assiduity of work. [...] From facts, biographies and history, the author manage to get this triumphant truth: genius is a creation of will.

And he continues:

The moral of this book is severe and at the same time encouraging: to young people, who are so easily concerned with their destiny, the injustice of fate, the bad taste of the century, the author repeats at every step, adding noble examples: «Work , struggle, persist, just count on yourselves». [...] It does not matter the subject to which man applies; it is enough for him to apply himself to it with all the energy of his character. [...] Life is a school; and yet the author of *Self-Help* attributes the enthusiasm of individual genius to the austere teaching of facts, to the social coexistence of men, to their struggles, if desired, to the hard lessons of adversity. No one can help somebody who does not help himself. And, on the contrary, for anyone who searches himself and rely on his own strength, the circumstance can generate a spark, which is the revelation of the intelligence¹⁰.

It is divided into fourteen dense chapters; each of one is dedicated to a particular field of economic and productive reality («Founders of Industries», «Energy and Courage», «Quality for Business», «Nobility of Character» etc.) *Chi si aiuta Dio l'aiuta* [Heaven helps those who help themselves], which is the Italian version curated by Gustavo Strafforello of *Self-Help* is basically made up of a series of practical lessons and, above all, by a large collection of brilliant anecdotes and an equally large gallery of powerful biographies of great characters. As it says the last part of the work's title, «from nothingness they rose to the highest levels in all branches of human activity», whose extraordinary experience is offered to the reader as an example, because «the example is one of the greatest instructor we have in the world, although it is silent. It is the practical school of the human race, a teacher by actions, which is more and more effective than the word».

In addition, the biographies of great men, according to the author of the work, are nothing more than «treasure chest» from which to draw models and examples, lessons and incitements to improve oneself, in order to direct our own lives and professional experience to go gradually beyond the many obstacles that interpose the achievement of success:

¹⁰ *Chi si aiuta Dio l'aiuta, ovvero Storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività, di Samuele Smiles, tradotto dall'originale inglese da Gustavo Strafforello, cit., pp. 5-6.*

The main advantage of the biography – said Samuel Smiles – consists of the noble models that it gives. Our great ancestors always live among us in the memories of their lives, as well as in the actions, they made, and they live: so they give us examples that we can always study, admire and imitate. Therefore, a book containing the life of a true man is full of precious seed. [...] Sometimes a young man finds himself in a biography, such as Correggio, who felt within himself the breath of a genius contemplating Michelangelo's paintings. [...] Franklin used to attribute his achievements to the reading of the *Saggio sulla Bontà* (*Essay to do Good*) of Cotton Matther, a book in which Matther reproduces the image of his own life¹¹.

We referred to the new Smilean man because, far from being a simple reference or a mere education manual for youth and popular classes to the values of work and the spirit of enterprise, the Italian version of Samuel Smiles' *Self-Help* proposes to readers a formative itinerary which, essentially focuses, from the point of view of the method, on a sort of very traditional *pedagogy of exemplary*. This version is characterized by its aspiration to affect the same formation of the character and on the promotion, in all levels of the population, of an ethical-civil ideal, in the peninsula at least¹².

It is no coincidence that in the already mentioned *Prefazione alla prima edizione italiana* (*Preface to the first Italian edition*) of the work, while on one hand it is stated that the book only «flatters the qualities that the Englishmen have in general», on the other, he emphasizes: «For us Italians, it teaches us to use the qualities we lack»¹³.

In addition, it is common that the education of *character*, understood as the fulcrum of the individual's personality and the real engine and center of inspiration for his choices and behavior, constitutes the summit and the culminating moment of the formative proposal carried by the *Self-Help*: Crown and glory of life – we read in the Italian version of Samuel Smiles' work – is the character. This is the most precious of the goods: it is the only one that can, in the general estimate, take place in fortune; the only one who ennobles every condition, and exalts every position in the eyes of society. [...] The nobility of character is the best quality in human nature: it is the moral order made man. [...] A man may have received a humble education, possessing mediocre wisdom and little or no luck. However, if this man is great for his character, he will always have a preponderant influence in the workplace, in bank, in the stock exchange, in the senate. [...] Each man must aspire to

¹¹ *Ibid.*, p. 303.

¹² Other works of Smiles were translated into Italian, including: S. Smiles, *Storia di cinque lavoranti inventori, ricavata dall'originale inglese e annotata da G. Strafforello*, Firenze, Barbèra, 1869; Id., *Risparmio. Prima traduzione italiana di Michele Lessona*, Firenze, Barbèra, 1876; Id., *Il dovere, con esempi di coraggio, pazienza e sofferenza, prima traduzione italiana consentita dall'Autore*, Firenze, Barbèra, 1881; Id., *Vita e lavoro. Studio sugli uomini insigni per operosità, cultura e ingegno. Traduzione autorizzata di Sofia Fortini-Santarelli*, Firenze, Barbèra, 1888.

¹³ *Chi si aiuta Dio l'aiuta, ovvero Storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività, di Samuele Smiles, tradotto dall'originale inglese da Gustavo Strafforello*, cit., p. 9.

possess a good character, as one of the supreme purpose in life. So it's good to have a high model. [...] Here is the place to point out how character can be fortified and supported by the cultivation of good habits. Self-respect, individual initiative, application, industry, and integrity are things that all belong to good habits¹⁴.

From the second half of the 1860s, as we have already mentioned, a freelance journalism was gradually spread to the peninsula, which, in a substantial and explicit way, was referred to Samuel Smiles' *Self-Help* and, even with very diverse outcomes, it resumed the setting and totally reiterated the formative goals and background guidelines.

2. «*The intimate, true, long-lasting enjoyments come from work, perseverance, and savings*»: *Volere è Potere* (1869) by Michele Lessona and the beginnings of 'labourist' literature on the peninsula

Following the editorial success recorded by *Chi si aiuta Dio l'aiuta* [Heaven helps those who help themselves] in this regard, in 1867, the Association for the education of the people of Florence called a competition for the publication of a work which, «draws only examples from the life of Italian citizens», on the model of Smiles' *Self-Help*, «which became very popular in England», it should have told educational aims «the lives of those men who, born in poverty and who grew up between every sort of difficulty and obstacle, they made it through them with the energy of the will and they achieved considerable social positions with advantages for them and the others»¹⁵.

Almost at the same time as the prize was declared by the Association for the education of the people of Florence in December 1867, the Head of Government and Minister of Foreign Affairs Luigi Federico Menabrea¹⁶ sent a newsletter to the consulates to solicit the acquisition of news and documents of Italians emigrated abroad. Those who had made good fortune and had been distinguished for their professional work, in order to give birth to a book that should have emulated that one of Samuel Smiles:

Mr. Samuel Smiles – wrote Menabrea – has published a book that has become very popular in England, he tells the life of those men who are born in poverty and grew up among all

¹⁴ *Ibid.*, pp. 312-317.

¹⁵ See M. Lessona, *A chi leggerà*, in Id., *Volere è Potere*, Firenze, Barbèra, 1869, pp. 5-6.

¹⁶ Luigi Federico Menabrea (Chambery 1809 – Saint Cassin 1896) was Minister of Marine in the first government headed by Bettino Ricasoli (June 12, 1861 – March 3, 1862) and Minister of Public Works in the ministries headed by Luigi Carlo Farini (December 8, 1862 – March 24, 1863) and Marco Minghetti (March 24, 1863 – September 28, 1864). Responsible from October 27, 1867 to form the new government, until the fall of the same, which took place December 14, 1869, also kept for himself the leadership of the Ministry of Foreign Affairs.

sorts of difficulties and obstacles, they went over them by the energy of will and achieved considerable social positions with advantage for them and others. We would like to write such a book in Italy, drawing only examples from the life of Italian citizens. This Ministry could rightly appreciate all the usefulness that might come from this publication, because once such a book it is publicized among the masses, it can only excite the emulation, pushing people to follow the examples that would be proposed in it. I pray your lordship, to take the task of collecting biographical notes up about the Italians who honestly enriched themselves in these districts, mentioning in particular the obstacles of their first life and the means they had for themselves, the country where they sought shelter and where they were born. [...] I am confident that your Lordship will want to provide a donation to this publication, which over time can potentially affect the greatness of our country¹⁷.

This is the scenario of the publication of the first and most famous Italian work inspired by *Self-Help*, the one of the scientist and writer of Turin, Michele Lessona, who two years later, in 1869, sent for print for the publisher Gaspero Barbèra the book *Volere è Potere*¹⁸. It is also destined to have a remarkable fortune, as evidenced by the fourteen editions reached until the First World War and, on a different level, the clear remarks annotated by the same publisher in his *Memorie*, where he stated that the work had produced «a lots of noise» and it had spread «rapidly to every part of Italy»:

It has been eight years since the book was published - said Gaspero Barbèra - and it is still being reprinted and sold. Like the *Ricordi* (*Memories*) of Massimo D'Azeglio, this book of Lessona will be read for a long time with the benefit of the education for Italian youth. The circulation has already increased to almost twenty thousand samples for both books¹⁹.

Beyond the similar editorial success, he associates the *Ricordi* of D'Azeglio, which appeared in 1867²⁰, to Lessona's work, published three years later. We find the same worry, which it will then be shared by a large part of the self-helpist and labourist Italian journalism of the last forty years of the nineteenth century. The necessity – at this point urgent and indispensable, concluded the glorious Risorgimento epic and finally accomplished the process of unification of the peninsula with the foundation of the united state – of *Fare gli Italiani* (*Being Italians*), or proceeding at the same time to smooth the rough edges off people and to the formation of *Italians' character* on the basis of well-defined

¹⁷ *Circolare del ministro degli Affari Esteri Federico Menabrea ai Consoli italiani*, Firenze 17 dicembre 1867, in Archivio Storico Diplomatico del Ministero degli Affari Esteri (ASDMAE), serie D, busta 1, 8. Circolari di gabinetto (1859-1871).

¹⁸ M. Lessona, *Volere è Potere*, Firenze, Barbèra, 1869.

¹⁹ G. Barbèra, *Memorie di un editore pubblicate dai figli*, Firenze, Barbèra, 1883, pp. 360-361. On the figure of Barbèra and the role exercised for the dissemination of self-helpista literature and labourist in Italy, see: D. Frezza, *Paternalismo e self-help in Gaspero Barbera*, in I. Porciani (ed.), *Editori a Firenze nel secondo Ottocento*, Firenze, Olschki, 1983, pp. 107-126; and G. Tortorelli, *Non bramo altr'esca: identità nazionale, cultura classica e selfhelpismo nelle edizioni Barbèra*, «Rara Volumina», vol. 18, nn. 1-2, 2011, pp. 59-100.

²⁰ M. D'Azeglio, *I miei ricordi*, Firenze, Barbèra, 1866.

moral and civil instances, which, according to the liberal ruling classes and bourgeois intellectual élites, should have been the cornerstones of «the nation-building program» as well as the main purpose of progress for the Italian people, called «be better, to become one day like any other civilized people»²¹.

Built, unlike the Smiles' Self-Help, exclusively on stories and examples drawn from «the lives of Italian citizens», and focused exclusively on the conditions and needs of the newborn state, *Volere è Potere* was an attempt to provide answers, or at least to find a way to give concrete effect to the famous instance formulated two years earlier in his *Ricordi* by Massimo D'Azeglio of *Fare gli Italiani*. It is no coincidence that, from the very first pages of the book, the theme of the indispensable reform of the *character* and the equally appropriate renewal of the ethical-civilian customs of the peninsula's people – a theme destined to have an undisputable relevance in the political and cultural debate of the post-united season²² – it gets a huge fame and becomes in all respects the leitmotif of the discussion:

The story, which in the future will tell the feats of Italians, will put in a beautiful light this admirable fact that those, who seemed dead and eradicated by a group of nations, as in good faith they judged foreigners, they wanted to be children of a nation again, they wanted it with perseverance, they wanted it from one end of the peninsula to the other, all of them, concordantly, strongly, tenaciously... It's a story of yesterday, and it looks like one of a few centuries ago. Conspiracies, clandestine press, insurrectionary motions, spies, jails, dungeons, gallows platforms, a king who is a champion of homeland independence, battles, victories, defeats, villages as the deserted cities of young people flowing from everywhere to fight, the conquest [*sic*] finally accomplished of homeland independence. The Italians showed that they had the first, the most necessary of all the virtues, the one without which all the others are worth nothing, the one that more than anything else wants to be instilled in the soul of young people, cultivated by adults and old people, companion and support of all ages, the virtue of willpower. The motto does not fail – *Volere è potere*²³.

But all this, underlined Michele Lessona, belonged to the past, even to a «big past». And the real disadvantage of the newborn State was that «many Italians, unfortunately» seemed incapable of projecting themselves forward, thinking and acting in the future: «Even today they show too much of these glories», instead of «ardently improving themselves». Hence the urgent need to undertake a program of cultural and civil redemption that should have embraced the individual and the entire national community:

²¹ Lessona, *Volere è Potere*, cit., p. 22. About the extensive and effective work of scientific popularization conducted by Michele Lessona see in particular M. Bonifetto, *Self-help all'italiana. L'opera di divulgazione di Michele Lessona*, in A. d'Orsi (ed.), *Michele Lessona (1823-1894), «Quaderni di storia dell'Università di Torino»*, vol. 1, 1996, pp. 31-48.

²² See S. Patriarca, *Italianità. La costruzione del carattere nazionale*, Roma-Bari, Laterza, 2010.

²³ Lessona, *Volere è Potere*, cit., p. 11.

The stranger no longer oppresses our country by now, the reasons of political hatred died down by now. Today, Italians can look at the stranger, measuring with him, and be able to confess in order to not being less and drawing from this confession the argument for every good way and every generous effort to get better. Italians have to learn a virtue: the work habit. [...] Other more miserable victories will be obtained. Ignorance, superstitions, abortion at work, glorification of idleness, mistakes, lack of personal dignity and honesty, discord, envy, rage, self-interest, they are enemies to Italy far more dangerous and terrible than the Austrians were. It is important to win them at any cost.

And again:

For now, the hymn of triumph keep quiet and we must think of continuing the struggle: a nation never triumphs, it is always surrounded by new dangers, and it does not have to go back from defenses and from walking forward. If it stops, a nation backwards. Italy must fight against its internal and incipient enemies, to take the place that belongs to it among the civilian nations. Moreover, to those who, in order to reconcile their ignorance, put luck in place, we answer, that luck exists. Yes, it exists; but it is not visible, it is not allowed to seize it except from those who have acquired rights to see it and to catch it. These are the men who are working, intelligent sober lovers of labor and savings, without them nothing ends up well, for how great the gains are. [...] So now we have to get ourselves down to work: we have weapons: every province has precious gifts of nature, intelligent men who have tenaciously struggled, and with the perseverance of the will managed to be useful to themselves and to others. Every Italian province has excellent men, sometimes obscure, but worthy of admiration. These good exemplary men deserve to be better known, and this is the very intent of the book²⁴.

In the same year of the *Volere è Potere* publication by Michele Lessona, in 1869, it saw light another text intended to be included among the products of the *self-help* or proletarian literature of the peninsula: we are referring to *Il Plutarco italiano. Vite di illustri italiani* [Italian Plutarch. Lives of illustrious Italian], given to the prints in the well-known «Biblioteca utile» («Useful library») of the milanese publisher Emilio Treves by the engineer and former artillery colonel Carlo Mariani²⁵. The work, presented in December 1867, still handwritten at the competition of that year by the Italian Pedagogical Society on the subject of «The New Italian Plutarch», was first rejected because it was too focused on «the military element» and lacking in «omissions» and historical stretches. Subsequently, the author presented the new edition of the prize, launched in July 1868, «the same work extensively enlarged, corrected and recast», finding this time the jury's full appreciation for «the merits of historical erudition, distinct knowledge of military things and a sober, firm and effective style», and thus obtaining the gold medal from the Italian Pedagogical Society:

²⁴ *Ibid.*, pp. 22-23 and pp. 31-32.

²⁵ C. Mariani, *Il Plutarco italiano. Vite di illustri italiani*, Milano, Treves, 1869.

The Pedagogical Society – stated in the motivation of the jury’s award – wanted an educational and popular book about the educational relationships of history and civilization. This purpose has been achieved by the author of this book, from whose reading it should be possible to hope that the people draw their knowledge of their own history, affection for the worthy individuals of the nation and the generous sense of their destinies. It is a book full of education, warm affection and moral and military teachings, so that the youth mostly educated to the arms can find it useful and delighted²⁶.

In fact, the 32 biographies of «de’ sommi italiani» («the greatest Italians») proposed in his *Plutarco* by Carlo Mariani only partially answered to the self-helpist ideal introduced in Italy with the publication of the work of Samuel Smiles and later relaunched with Michele Lessona text. The choice to move from Julius Caesar to Marcus Aurelius and to recall two thousand years of history until the completion of national unification, giving space to intellectuals, philosophers and scholars (Cassiodoro, Dante Alighieri, Vittorino da Feltre, Tommaso Campanella, Ludovico A. Muratori); artists and scientists (Leonardo da Vinci, Michelangelo Buonarroti, Galileo Galilei); clergymen (Gregorio Magno, Gerolamo Miani, Federico Borromeo); sailors and merchants (Marco Polo, Cristoforo Colombo, Andrea Doria) politicians and leaders (Castruccio Castracani, Francesco Sforza, Napoleone Bonaparte and Camillo Benso di Cavour) made the work more of a sort of extensive compendium of the ancient, medieval and modern history of the peninsula presented by stories and biographies than a work destined, according to the author in the preface, «to awaken the spirits with noble and great examples» from the lives of «illustrious men by magnanimous achievements», the «Italian people» and proposing these «noble and illustrious examples» of virtue and wisdom «to the imitation of our compatriots»²⁷.

Much more in accord with Smiles’ *Self-Help* were a series of printed texts from 1870 to the early 1890s, among which we report: *Le glorie e le gioie del lavoro*²⁸, by the famous hygienist and anthropologist Paolo Mantegazza²⁹; *Gli eroi del lavoro proposti all’imitazione del popolo italiano*³⁰ and *La scuola della vita. Precetti, esempi ed aneddoti*³¹, by the mentioned publicist and writer Gustavo Strafforello; *Il lavoro educa e rallegra. Racconti di fatti contemporanei*

²⁶ *Relazione e Voto della Commissione aggiudicatrice della medaglia d’oro al tema «Il Nuovo Plutarco Italiano» posto a concorso dalla Società Pedagogica Italiana nell’anno 1867*, «Patria e Famiglia», 8 (22 agosto 1868), n. 11, pp. 3-4.

²⁷ Mariani, *Il Plutarco italiano. Vite di illustri italiani*, cit., pp. 1-4.

²⁸ P. Mantegazza, *Le glorie e le gioie del lavoro*, Milano, Maisner, 1870.

²⁹ See C. Chiarelli, W. Pasini (edd.), *Paolo Mantegazza. Medico, antropologo, viaggiatore*, Firenze, Firenze University Press, 2002.

³⁰ G. Strafforello, *Gli eroi del lavoro proposti all’imitazione del popolo italiano*, Torino, Unione Tipografico-Editrice, 1872.

³¹ Id., *La scuola della vita. Precetti, esempi ed aneddoti*, Firenze, Barbèra, 1882. Su questo autore si veda: S. De Carlo, L. Nicolotti, *Self-helpismo ed etica del lavoro nelle opere popolari di Gustavo Strafforello*, «Rivista di Storia Contemporanea», vol. 17, n. 1, 1987, pp. 137-154.

*della vita civile e militare italiana*³², by the intellectual Francesco Gallo; *Battaglie e vittorie. Nuovi esempi di Volere è potere*³³, by the philosopher and educator Augusto Alfani; and, finally, *Virtù e lavoro, o racconti storici italiani esposti per buon esempio ai giovanetti*³⁴, by the educator of deaf-mute Pasquale Fornari.

3. *The apogee of 'labourist' literature in Italy in the second half of the nineteenth century: Le glorie e le gioie del lavoro (1870) by Paolo Mantegazza and Battaglie e vittorie (1890) by Augusto Alfani*

Based on *Le glorie e le gioie del lavoro* [Glory and joy of work] Paolo Mantegazza's text is perhaps the best example of true evolution – or involution, if wanted – made by the self-help journalism in the peninsula since 1870, as a result of an emphasis on some of the themes at the expense of others and where we find some of the important dimensions of Smiles ideology.

At the center of the work undoubtedly lies *the work*, here exalted as the «center of human activity» and as «the father of all virtues». Work constitutes for Mantegazza «the only source of wealth» and the primary mean to promote a strong and vigorous civil and ethical conscience in individuals and throughout the entire community. The author offers various and authoritative examples through the biographies of «decent and eminent Italians», «work generates prudence and foresight», «it leads man to good», it generates «a strong morality» and consolidates and strengthens «intelligence» and «character»³⁵.

The other face of the labourist ideology advocated by Paolo Mantegazza concerns the judgment on the «idle poor», the «beggar», the «deadbeat», those categories of «impoverished people» that the writer dismisses disdainfully with the hard epithet of «parasites»:

The begging – we read in *Le glorie e le gioie del lavoro (The glories and the joys of work)* – is certainly the most fierce picture of pauperism; it is the corrupt and stinking plague that laid bare in front of everyone; it is misfortune, it is pain without the shame, it is the man without the holy baptism of dignity. [...] A healthy man who can work, but he lays down his hand, is a man without modesty and dignity. He is already walking on the frontiers separating honesty from vice and crime. If he lift the begging to the profession's dignity, he is already an immoral man, dangerous to society that tolerates him. [...] And a society that tolerates begging is responsible for all crimes, all prostitutions, all evils.

³² F. Gallo, *Il lavoro educa e rallegra. Racconti di fatti contemporanei della vita civile e militare italiana*, Milano, Agnelli, 1882.

³³ A. Alfani, *Battaglie e vittorie. Nuovi esempi di Volere è potere*, Firenze, Barbèra, 1890.

³⁴ P. Fornari, *Virtù e lavoro, o racconti storici italiani esposti per buon esempio ai giovanetti*, Como, Franchi, 1890.

³⁵ Mantegazza, *Le glorie e le gioie del lavoro*, cit., pp. 30-32.

And he continues:

The beggar is a parasite that is born and grows in filth and darkness. [...] The discouraged and tattered man who grumbles begs for money in the streets is a perpetual school of immorality for the child, for the worker, for those who see him and pass through scornfully or indifferently or mercifully. [...] Those who are accustomed to the indecorous spectacle of a disgusting, insolent or hypocritical begging, and do not feel their part of shame, they will surely lose that exquisite sense of national dignity that can come to pride, but it has not to fall off a single line at the risk of giving up to be present among the nations who are at the head of uncivilization. The beggar generates the thief and the assassin; and if we want to burn or amputate pauperism from our social body, we must first heal that horrible plague that is called begging. [...] The working citizen has not be offended with the revolting aspect of human dignity publicly prostituted³⁶.

Work, therefore, as a liberation from all forms of parasitism and as an opportunity for growth and redemption essentially moral for all those who are animated by the «vivid and powerful breath of civilization» and who «earns bread with the sweat of the forehead»: a work destined, however, not to question the consolidated hierarchies and social equilibriums; it is stranger, or maybe hostile – unlike the original self-helpist ideal – at any hypothesis of The essence of work advocated by Paolo Mantegazza and most of Samuel Smiles supporters lies entirely in the moral and spiritual fulfillment of those who find his personal realization in work:

The heritage of human dignity grows every day and overflows to the most educated classes in every house, in every hut; the worker in his workshop may feel so noble and great as the honest rich man in his palace; the most humble work [*sic*] feels proud and well above each idleness; and every parasite must be crushed, repressed, extinguished³⁷.

Among the most popular texts, but also later on Italian self-helpism, the work given to the prints in 1890 by the catholic scholar Augusto Alfani, *Battaglie e vittorie. Nuovi esempi di Volere è potere* [Battles and victories. New examples of «where there is a will, there is a way], in some ways constitutes the most effective testimony of the singular interpretive trajectory taken in Italy by the doctrines of Samuel Smiles and, more specifically, the more mature version of the work ideology already largely proposed in the works of Gustavo Strafforello, Michele Lessona, Carlo Mariani, Paolo Mantegazza and those of their lesser-known imitators.

The purpose of *Battaglie e vittorie. Nuovi esempi di Volere è potere*, as the author himself reminded us, was to «pursue, not at least with equal value, but undoubtedly with the same affection, the work inaugurated by Michele Lessona with his *Volere è potere*», a book that became already «ancient» but in which he showed «the real life of Italy twenty years ago». Alfani noted, in the twenty

³⁶ *Ibid.*, pp. 238-241.

³⁷ *Ibid.*, pp. 245-246.

years since the publication of *Volere è potere*, that «the life of the Nation has gradually developed in its many aspects. Many of our fellow citizens in each of these aspects have been warned by the way to be offered to the admiration and example of all, and declared, for various reasons, well-deserved men of their country».

It was a question of continuing the work that Michele Lessona and the florentine publisher Gaspero Barbèra had begun, «mirroring in a second volume, this recent phase of national life, with a series of our men, who have known how to make true the popular judgment at home and abroad, happily removed by the author of this book»³⁸.

In reality, far from being merely a simple «update» of the text given to the prints by Michele Lessona twenty years ago, the work of Augusto Alfani set itself the goal of 'correcting' some deceptive interpretations aroused by the reading of *Volere è Potere* and, more specifically, rectifying some of the clichés commonly created by this text because of its excessive sequel to the Smiles' doctrines.

In other words, as the author stated, rather than considering «worthy of admiration only those who by simple principles could, because they wanted, to ascend to high state and fame»; it was far more appropriate to praise and propose to the approval and to the emulation of people, those who, «while remaining in the modesty of their condition, have strongly desired and lovingly been able to deserve their country, and bring to it prestige and decorum»³⁹.

Generally, the Florentine writer pointed out that, it was necessary to denounce the pernicious misunderstanding. – «It is easy to get into those who take books of this level» (ie the works that can be attributable to the self-help front) – there are «people who, from nothingness, succeeded in a short time, either in one direction or another, to become famous and millionaire»⁴⁰. It was necessary to make it clear to the readers that the social rise and the overcoming of the starting conditions to the achievement of economic conditions and of a status far superior from the starting ones were pure «exceptions, no rules» and they could not be considered as the real purpose of the new concepts of man and work handled by the proletarian ideology.

In fact, many others were the qualities to promote «adding the exemplary lives of some well-known citizens», in order to bring a «higher individual morality» and a «true national conscience» in the people of the peninsula. «Love for work and the good sense of saving», the «perseverance in doing good», the «righteousness of intentions», which is «the sincere aspiration of

³⁸ A. Alfani, *A chi leggerà*, in Id., *Battaglie e vittorie. Nuovi esempi di Volere è potere*, cit., pp. IX-XI.

³⁹ *Ibid.*, p. X.

⁴⁰ *Ibid.*, pp. XI-XII.

doing useful and good things»; the «sincere patriotism» and «disinterested love for civil institutions»⁴¹.

4. *The self-helpist italian life: between economic backwardness and political and social conservatism*

The rapid *excursus* here led to the spread, through the famous text of Samuel Smiles, of self-help doctrines in Italy, and the subsequent development in the peninsula of a specific line of proletarian works. It allows us to deepen some aspects and characteristics of this type of journalism mainly directed at the youth and popular classes and the peculiar educational proposal carried by it in our country between the nineteenth and twentieth centuries.

Specifically, the purpose we propose is to focus on the actual reception in Italy reserved for the self-help pedagogy of an Anglo-Saxon origin or on the actual rejection – evidently emerged already in the short examination of the contents and backgrounds of Michele Lessona, Carlo Mariani, Paolo Mantegazza and Augusto Alfani texts – between the doctrines postulated in the Self-Help Smiles ideal and those made with the formal respect and *sui generis* reference to innovative ideas by Samuel Smiles, from our working-class literature.

As is well-known, in Anglo-Saxon culture, self-help is synonymous of «nobility of merit» and social realization, ascension and movement between classes, and it stands firm with the process of economic and civil growth of a typical capitalist line of american world, largely influenced by calvinism and puritanism, as Max Weber pointed out⁴². At the heart of the scene is the self-made man, the man who builds his own future between virtue and fortune (the latter considered in his Renaissance sense) and animated by the passion for work, the optimism of will and a deep confidence in progress and human intelligence⁴³.

In this scenario there is a real centrality of *work*, which – in the most authentic and genuine spirit of the Anglo-Saxon self-helpism – constitutes the mean, the ultimate instrument to go beyond our own starting condition, to break the traditional barriers of class and to ascend to the highest levels of social hierarchy. Hence the outline of the modern myth of the entrepreneur, of the scientist, of the banker, and of the political man, who, in spite of their

⁴¹ *Ibid.*, pp. XIII-XV.

⁴² We refer, of course, to M. Weber, *Die protestantische Ethik und der Geist des Kapitalismus*, edited for the first time in «Archiv für Sozialwissenschaft und Sozialpolitik», 1904-1905. See the Italian version of the work, with an introduction by Ernesto Sestan, in: *L'etica protestante e lo spirito del capitalismo*, trad. ital., Firenze, Sansoni, 1965.

⁴³ See I.G. Wyllie, *The self-made man in America. The myth of rags to riches*, New Brunswick (NJ), Rutgers University Press, 1954.

humble origins and the unfavorable conditions of their starting situation, with the only force originating from their will and from the «commitment in work and professional life», have managed to reach the top of success and the highest positions of society.

The dominant theme is that of individual self-realization, which, however, is intertwined with the one of the modernization of industrial society, thus stands for the most general theme of the construction and consolidation of the economic and social system from the capitalism during the nineteenth century.

An economic and social system, established in the Anglo-Saxon world between the eighteenth and nineteenth centuries, based on a set of well-established values and principles that clearly define the peculiar profile: the taste of risk and challenge, an innate passion for fair competition, the rooted conviction of the true centrality faced by norms and principles governing the life of the community, a serene and optimistic vision of life and social coexistence; last but not least, the feeling of belonging to a «big nation» constantly evolving, where there is the idea of contributing with work and civil commitment to build a better society.

Inevitably different, but characterized by certain common motives and references, the workmanship of most of the followers and imitators of Samuel Smiles' *Self-Help* was to be revealed⁴⁴. It's enough to say in this regard that one of the cornerstones of the traditional self-help concept, the ideal of social ascent and the consequent overcoming of the classical barriers that could be achieved through work, were destined to «break on the rocks» of a socio-economic system – that of the nineteenth-century liberal state – not only closed and immobile in its rigid configuration of a traditional character, but also strongly hostile to any form of mobility from one class to another, to the point of being defined with unequivocally negative and contemptuous terminology – *ambition*, unscrupulousness and so on. Those attitudes denoted an explicit will to social ascent.

In fact, the study of 'labourist' literature in Italy in the last thirty years of the nineteenth century reveals that the exaltation of work and professional activity is completely unconnected – as opposed to the self-helpism of Anglo-Saxon matrix – from the reference to the mobility between classes and to a possible social rise.

In this regard, for our workers, the assiduous and conscientious exercise of work involves moral and behavioral benefits above all, for the individual who practices it, in addition to a moderate wealth as a result of his greater commitment and his recognized professional reliability. In this regard, emblematic is a page of the already mentioned *Le glorie e le gioie del lavoro* by Paolo Mantegazza, where he states:

⁴⁴ See M. Berra, *L'etica del lavoro nella cultura italiana dall'Unità a Giolitti*, Milano, FrancoAngeli, 1981.

From the simplest mechanical work to the highest conceptions of the mind that it creates, the man who works is a man who rises to a higher region that is far above the mud of animal needs. [...] Those who work do not get drunk, those who work do not drag themselves around, those who work do not act as a libertine, do not steal, do not blaspheme, do not waste time, do not slander, do not envy. [...] The worker leaving the house with his hands in his pocket and the pipe in his mouth willing not to work finds it easy to find the way to dive bars and infamous places. The worker who goes out in the evening at the workshop, after a busy day, never finds his legs ready to enter those places. [...] The joy of work is a fruitful joy, because it prepares a future of peaceful wealth for laborious man, tender self-satisfaction, and hundred legitimate satisfactions of his own love⁴⁵.

As you can see, there seems to be no doubt about the substantial difference between «serene wealth» and the «legitimate consolations of self-respect» postulated by Mantegazza and other Italian *workers* and the ambitious goals achieved by those who, in the wake of the Smiles ideal, «from the bottom they could rise to the highest degrees in all branches of human activity» and reach fame and wealth. It could be added that in the educational journalism from the proletarian front, there is a lack of passion for the great challenges and loyal competitions, and feelings of a collective ideal to be achieved, and the participation to a common project: the horizon of our Self-help current is all contained within the promise of a mere «improvement» of his own individual condition, whose realization is far from implying a dangerous mixing between classes and an unacceptable questioning of the traditional social order⁴⁶.

In this respect, the rich and varied journalism of a proletarian line published in Italy in the second half of the nineteenth century was destined to constitute a formidable instrument – as inspired by a laical and modern conception of national life – of wealth's legitimacy and social differences, at the very moment when the start and consolidation of anarchist and socialist propaganda among the rural and urban people threatened to undermine the liberal state and to question the bourgeois hegemony in Italy.

It may be said in this regard that, against socialist preaching, which promotes the abolition of class differences and social equality achieved through a collective revolutionary process, Italian self-helpism or proletarian current intended to promote the fascination for those at the top of the social scale and the true cult of individual realization. At the ideal of the *class struggle* is opposed that of *emulation of upper classes*, in the firm will to contain and direct the unrest and the serious discomforts of the popular classes and thus to maintain the social, political and traditional balance.

⁴⁵ Mantegazza, *Le glorie e le gioie del lavoro*, cit., pp. 32-33.

⁴⁶ See C. Lozzi, *Dell'ozio in Italia. Libri quattro*, 2 vols., Torino, Unione Tipografico-Editrice, 1870-1871.

Histórias do Tio Damião (1942-1951), by Lourenço Filho: an interpretation of Brazil through children's literature

Estela Natalina Mantovani Bertoletti
Department of Education
Mato Grosso do Sul State University
Paranaíba (Brasil)
estela@uems.br

Maria do Rosário Longo Mortatti
Department of didactics
São Paulo State University
Marília (Brasil)
mrosario@marilia.unesp.br

ABSTRACT: Brazilian educator Manuel Bergström Lourenço Filho (1897-1970) dedicated himself to a range of activities with national and international repercussion. Despite of the importance of his work and his concern with education in accordance with the principles of the educational renovation movement as well as with the political debate surrounding the modernization of the nation, especially from the 1930s onward, his production as a writer of children's literature remained overlooked. Aiming to understand this facet of this educator's work, the *Série Histórias do Tio Damião* (1942-1951) is analyzed. It can be concluded that, by means of these books, Lourenço Filho taught an interpretation of Brazil to the children of the time, as well as a way of writing and editing texts and teaching through children's literature, to adults of that time and beyond.

EET/TEE KEYWORDS: History of education; History of children's literature; Modernization; Brasil; XXth Century.

Introducion

My writings for children are a practical consequence of studies on psychology and education, which I have always devoted myself to¹.

Brazilian educator Manuel Bergström Lourenço Filho (1897-1970) earned his teaching degree from the *Escola Normal de São Paulo* (Teacher's College of São Paulo), as well as a bachelor's degree in Social Science and Law from the *Faculdade de Direito de São Paulo* (São Paulo Law School). Throughout his extensive and intense professional career², across seven decades and during various federal governments, he dedicated himself to a range of activities, assuming prominent strategic positions on the national and international stage. He acted as a teacher (of Pedagogy and Psychology), researcher (especially in the fields of applied psychology/psychometrics)³, public administrator, writer⁴, and editor, having received, by national and international bodies, dozens of titles and honors for his work.

His primary concern with education was articulated with the political debate surrounding the modernization of the nation, as well as with the objective conditions for action created by the installation of the Brazilian *New Republic*, especially after the creation of the *Ministério da Educação e Saúde* (Health and Education Ministry) in 1930. Lourenço Filho and other intellectuals of that time summarized in the *Manifesto dos Pioneiros da Educação Nova* [Manifesto of the New Education Pioneers] (1932)⁵ the principles of the new education movement based on the principle of public, secular, free, and compulsory education that guided his professional work.

Given the importance and repercussions of this educator's ideas and work even today, several aspects of his professional career – always pioneering and innovative – have been studied by Brazilian researchers, especially since the

¹ M.B. Lourenço Filho, *Livros para crianças*, «Revista Brasileira de Estudos Pedagógicos», n. 77, 1960, pp. 215-221.

² Detailed information on his work, titles, and honors can be found in C. Monarcha, R. Lourenço Filho, (edd.), *Por Lourenço Filho: uma biobibliografia*, Brasília, DF, Inep/MEC, 2001.

³ He is considered a pioneer in the relationship between psychology and education in Brazil. See: A.G. Penna, *Lourenço Filho e a história da psicologia no Brasil*, in C. Monarcha (ed.), *Lourenço Filho: outros aspectos, mesma obra*, Campinas, Mercado de Letras, Marília, PPG Educação-FFC-Unesp, 1997, pp. 13-26.

⁴ His extensive written production includes, as aspects discussed in this paper, textbooks, primers, and articles. Ruy and Márcio Lourenço Filho affirmed that the «pedagogical publicist» approach characterizes their father's work that can be classified into four categories: education in general, psychology, social issues, and writing for children. R.C.B. Lourenço Filho, M.C.B. Lourenço Filho, *Notícia bibliográfica de Lourenço Filho*, in Associação Brasileira de Educação, *Um educador brasileiro: Lourenço Filho*, São Paulo, Melhoramentos, 1959, pp. 190-203.

⁵ With 26 signatories this document initiated the *Escola Nova* movement in Brazil, led by Lourenço Filho, F. Azevedo, and A. Teixeira. See: F. Azevedo, et. al., *A reconstrução educacional no Brasil. Ao povo e ao governo. Manifesto dos Pioneiros da Educação Nova*, São Paulo, Cia Ed. Nacional, 1932.

1980s and in the areas of (the history of) education and psychology. However, his production as a writer of children's literature has been overlooked until recently, despite the demand for interdisciplinary studies to broaden understanding of its meaning and its organic relation with the rest of his work and with his children's literature production. Covering original books, guidelines for authors and adapters/translators, as well as revision of texts from the genre, this facet of the Lourenço Filho's work can be considered as a «concretization»⁶ of his way of thinking about the genre, in accordance with the principles of the *Escola Nova* ideology.

These principles were formulated through dialogue with the production of children's literature by other authors of that time, and were thematized in other texts by Lourenço Filho as: book chapters, articles, conferences, periodicals, literary critiques, «academic receptions», introductions, prefaces to children's literature books, and to books about this subject, besides opinions, manuscripts, and letters. Some of these texts were written when the author was the president of the *Comissão Nacional de Literatura Infantil* (National Commission of Children's Literature)⁷.

Aiming to contribute to broaden the understanding of these aspects, we analyze the production of children's literature by Lourenço Filho, concretized in the *Série Histórias do Tio Damião* [Uncle Damião Story Series], published by *Companhia Melhoramentos* (Melhoramentos Publishing House) (SP). It is composed of 12 books whose first editions were published between 1942 and 1951, with successive reissues until 1958.

In the relationship with the time and with the author's work as a whole, the Series is analyzed here in its «textual configuration»⁸. In this sense, it integrates, through direct and complementary dialogue, the political-educational ideology that guided the work and the career of its author.

⁶ Regarding the content, purpose, and form of the children's literature texts, the terms «concretization», «normalization», and «thematization» are used here in the sense given by M.R.L. Mortatti, *Os sentidos da alfabetização. São Paulo (1876/1994)*, Brasília, DF, MEC/INEP/CONPED, São Paulo, Ed. UNESP, 2000.

⁷ Between 1936 and 1937, Lourenço Filho was president of this Commission that was a regulatory body linked to the Ministério da Educação e Saúde, with the purpose of organizing, establishing, and selecting children's literature produced at the time in Brazil. See: E.N.M. Bertoletti, *Lourenço Filho e Literatura Infantil e Juvenil*, São Paulo, Ed. UNESP, 2012.

⁸ Mortatti, *Os sentidos da alfabetização*, cit. p. 31.

1. *Context of production and circulation of the Série Histórias do Tio Damião*

The *Série Histórias do tio Damião* was composed of the following books: *Totó* (1942), *Baianinha* [The Baianinha. The little girl from Bahia] (1942), *Papagaio Real* [Royal parrot] (1943), *Tão pequenino...* [So small...] (1943), *Saci-Pererê* (1944), *O índiozinho* [The little Indian] (1944), *A Irmã do índiozinho* [The little Indian's sister] (1944), *A Gauchita* [The Gauchita. The little girl from Rio Grande do Sul] (1946), *A formiguinha* [The little ant] (1946), *No circo* [At the circus] (1946), *Maria do Céu* [Mary of the Haven] (1951), *E eu, também...* [And me, too...] (1951).

With innovative editorial, graphic, and linguistic aspects, the books were reissued between two and eight times, totaling more than 600 thousand copies over at least 16 years of reissues.

This data, and the circulation period highlight the importance of the series, which was aligned with the search for answers to the urgent cultural and educational needs of the time, fomented by the growing industrialization and urbanization processes, which led to an increased and interrelated demand for school education and children's books. The dissemination of elementary education aimed to formally combat illiteracy and broaden citizen education through reading; education reform was at the service of social and cultural reform; reading – and consequently, children's literature – figured as an important element in this ideology.

Considering this context, the importance of the series can be seen when comparing data on editions and copies with data on school enrollments and the publication of children's books. In the 1940s and 1950s, elementary school enrollment rates grew, and schooling expanded, as did the Brazilian publishing market in relation to the publication of children's books, alongside increased competition among those who dedicated themselves to this publishing field.

Although this was not enough to meet the schooling demand, these advances also had an effect on the production of children's books, reflecting the historical relationship between children's literature and school education. According to Lajolo and Zilberman⁹, the professionalization and specialization of writers and editors are marking features of the 1940s to the 1960s, related to the expansion of the publishing market and accompanying the increase in the number of students enrolled in elementary school. In 1942, 605 children's literature titles had been published¹⁰; and, by 1954, there were 2,388 children's literature titles published in Brazil¹¹.

⁹ M. Lajolo, R. Zilberman, *Literatura infantil brasileira: história & histórias*, São Paulo, Ática, 1984.

¹⁰ M.B. Lourenço Filho, *Como aperfeiçoar a literatura infantil*, «Revista Brasileira», vol. 3, n. 7, 1943, pp. 146-169.

¹¹ L. Fraccaroli, *Bibliografia de literatura infantil em língua portuguesa*, 2 ed. aumentada, São Paulo, Editôra Jornal, 1955.

2. Characteristics of the books of the series

2.1. The publishing project

The *Série Histórias do Tio Damião* was backed by a careful and innovative publishing project, especially with regard to the graphic aspects. All the books are small, but vary in size from 24 x 10.5cm to 23.5 x 10.5cm due to the non-linear profile of the top and right margins that accompanies the contours of the cover illustration. This novel and unusual aspect represents the growth achieved by the graphic arts in general and especially by children's books in Brazil from the 1930s onward.

The books were paperback, the covers printed on good quality paperboard and the internal pages, on newspaper stock. These characteristics also attest to the care and graphical innovation taken by the publisher, which had a learning section for the graphic practitioner who was usually started at 17 years¹². In addition, the author was involved with every little detail regarding the making of his books, supervising, guiding, and suggesting what should be done¹³.

All books contain illustrations, colored covers and back covers. Most of the covers are composed of the same elements: a colored background, a figure that occupies the entire width and height, and the title at the bottom. This layout demonstrates a great concern with form, not only because of the figurative design of the covers, but also due to its arrangement on the paper. The title at the bottom of the page functions as a description of the illustration that, as a whole, seeks to act as a picture. The lively, compact, and vibrant tones of the cover illustrations also contribute to the inference that it is a frame with a title chosen with the objective of attracting the reader.

Most of the back covers also produce an impressive graphic effect, giving the cover illustration another dimension – the back covers show same illustration as the front, but reversed. This way, if the book is opened with the two covers simultaneously visible, the figure can be seen from the front and back, or on the right and left side, always in the same position and colored in the same way.

The title pages of the books contain not only the titles of the series and the book, as well as the book number, but also the name of the illustrator, which was an innovation at the time: the recognition of this profession. However, it should be noted that the author's name was absent from the book cover on all the editions to which we had access¹⁴.

¹² Y.S. Lima, *A ilustração na produção literária. São Paulo – década de vinte*, São Paulo, Instituto de Estudos Brasileiros – USP, 1985.

¹³ Information provided by his son, Ruy Lourenço Filho, in informal conversation, in 1997.

¹⁴ After the publication of the first edition of *Cartilha do Povo*, in 1928, the name of the author does not appear in this or any other book that Lourenço Filho wrote for children and for use in schools. One likely reason is that he made the decision himself during the period in which he held leadership positions in the administration of public elementary education.

On most title pages, there are vignettes extracted from the internal pages of the books, because, from the 1920s onward, with the growth of the graphics industry in Brazil, this procedure became usual¹⁵. These vignettes, like all the internal illustrations of the books in the series, were colored in a single (varying) shade of red, plus black.

From page 3 onward in all the books, the font is medium in size, in an area that occupies an average of 10 x 7cm of the page, preceded by headings of an average 7 x 7cm that are separated from the text by approximately 1 or 2 cm. There is therefore a sufficient margin and space so as not to «pollute» the page, nor to leave the text too «free». In addition to the visual impact, these graphical features complement the author's desire to adapt children's books to the age of the intended reader, which, in the case of this series, were aimed at children from six to eight years of age¹⁶.

In all the books of this series, the illustrations are simple and efficient, with an emphasis on narrative function, clarity, and/or reference. These characteristics can be related to the idea of integration between literary discourse and visual image, because, according to the author, illustrations reinforce the balance between reality and fantasy in the literary text.

2.2. *The stories*

In the texts of these books, the narration is flexible and objective, as another example of concretization of the principles defended by the author, especially those related to the adaptation of textual elements to the age of the intended reader, in accordance with age ranges proposed by the author as a result of his research into psychology applied to education¹⁷.

¹⁵ Lima, *A ilustração na produção literária*, cit.

¹⁶ According to Lourenço Filho, in order to guarantee the specificity of children's literature, «the age of the children» should be taken into account and be adapted to the theme, form, and graphics of the books. Seeking to satisfy a need for «practical order», the author presented methods of organizing the books, that he categorized as follows: «a) albums of illustrations, coordinated by a single theme, or not, with little text or even no text, for children from 4 to 6 years of age; b) fairy tales and simple narratives (fables, apologues), for children from 6 to 8 years of age; c) longer narratives for children aged 8 to 10; d) travel and adventure stories for children from 10 to 12 years old; e) in addition to romance biographies». Lourenço Filho, *Como aperfeiçoar a literatura infantil*, cit., pp. 160-161.

¹⁷ Lourenço Filho initiated this research in 1924, and expanded it in the following years, based on the hypothesis of a maturity level as a prerequisite for learning to read and write, which formed the basis for his book *Testes ABC - para verificação da maturidade necessária ao aprendizado da leitura e da escrita* (1934). He improved this division of reading levels in the *Série de Leitura Graduada Pedrinho*. See: Mortatti, *Os sentidos da alfabetização*, cit.

The books in the series are characterized by the presentation of «[...] fairy tales and simple narratives (fables, apologues)»¹⁸, and therefore contain short, simple narratives, mostly very direct: family life, animals, relationship with other children, and curiosity about other places and cultures.

In *Totó*, there is the story of a puppy whose name gives the book its title. He appears in Dedé's house, from «no one knows where», «with no education» and no «good behavior», and starts creating mischief. Due to its bad behavior, Totó is punished: it is tied up on a leash in the yard, where it learns to be obedient and, after being released, it is rewarded with affection from everybody in the house.

Dedé appears again, as the protagonist in *Baianinha*, a title that refers to the nickname she receives for participating – without anyone knowing – at a carnival dance at her aunt's house, dressed in a costume from the state of Bahia. Despite the mischief, the girl is not punished; on the contrary, she is applauded for the grace and resourcefulness she demonstrates at the ball.

The character of Dedé also appears in *Papagaio Real*, in which is told the story of a parrot that does not speak, given to Dedé by her uncle, Tio Damião. After waiting a long time for the parrot to talk, Dedé discovers that if she called him the «royal parrot of Portugal», he spoke; and if called him a «blond parrot», he would shut up. Having «taught» the parrot to speak, Dedé is allowed to keep the bird, instead of sending him back to Tio Damião.

In *Tão pequenino...*, the same character, Dedé, is given a cat by her neighbor, Dona Amélia, and she names it Gato-Flor. Because the kitten is still very small, it meows a lot and Dedé has to return it to the neighbor, who takes care of it with its mother, Mimosa, until it has grown up. Dedé then moves to the countryside with her mother, who is ill, and when she returns after some time without seeing the kitten, she finds it grown up, fat, and strong, and cannot believe that it is her Gato-Flor.

Dedé appears, once again, as a character in *Saci-Pererê* (1944). Having gone to play at her neighbor's house, she meets some other children – Tininha, Maria Amélia, Selene, Naná and Evaristinho – and Tia Sabina, a superstitious old housemaid, tells them about the legend of Saci-Pererê. In the end, the children are not convinced of Tia Sabina's beliefs, and respond to the legend with good humor.

In *O indiozinho*, Tio Damião and Dedé tell the story of Amberé, a brave, skillful, clever, and observant twelve-year-old Indian who, according to Tio Damião, represented the Indians in general with his strength, bravery, kindness, and help building Brazil.

In *A Irmã do indiozinho*, Tio Damião and Dedé tell the story of Amberé's sister Panambi, a good, lively, and cheerful little Indian, who, despite being the same age as the narrator, performs all the duties culturally expected of the

¹⁸ Lourenço Filho, *Como aperfeiçoar a literatura infantil*, cit.

women in her tribe. Upon hearing the story of Panambi, Dedé, who had wanted to be an Indian, gives up on the idea, preferring the role of the child in her white culture.

In the story of *A Gauchita*, Rosa, the little girl from Rio Grande do Sul, talks to Dedé about the Brazilian state of Rio Grande do Sul. In the conversation, Rosa tells Dedé about the language and customs of the people from this Brazilian state, praising them for their strength and courage.

In *A formiguinha*, Dedé's Grandmother tells her the story of the little ant, which, annoyed by the rain, leaves the anthill, and gets stuck in the mud for more than half an hour, until the sun dries it out. The little ant began to realize that the sun was stronger than the mud and that other things were even stronger: the hill that hid them from the sun, the mouse that chewed the hill, the cat that ate the mouse, the dog that bit the cat, the man who beat the dog. Lastly, it realized that God was stronger than all of them, because it was He that did all of these things, being He the goodness above all else. Dedé's Grandmother concluded that when we are good, we love and serve God.

In *No circo*, Dedé goes to the circus with Tio Damião and learns about the routine, the customs, the artists, and the employees, and is even kissed on the cheeks by a little clown that descends with a parachute, as if he had fallen from the clouds, leaving his face-paint all over her face.

The title of *Maria do Céu* refers to the name of a character, Rosa, from the Brazilian state of Ceará, who talks to Dedé about her home. In the conversation, Rosa tells Dedé about the language and customs of the people from Ceará, praising them for their strength, joy, and kindness, and emphasizing that the migration of people from Ceará to the North and South of Brazil proved that we are all Brazilians.

In the last book of the series, *E eu, também...*, Dedé and Tio Damião play the «and me, too...» game. Dedé wins a Bahian doll as a prize.

2.3. *The characters*

The stories of the books under analysis thematize the daily life of Dedé, a curious and smart little girl who likes to get into mischief. Through stories told by Tio Damião or other narrators, through experiences with animals and dialogues with other children, Dedé learns about different regions and customs, as well as Brazilian folklore and life lessons.

The character transitions from one story to another, being portrayed in a static and defined way, despite having «lived» in fiction for almost ten years (1942-1951) and having been «read» for more than a decade. A little girl, presumably of the same age as her intended readers, Dedé maintains a relationship that was common at that time, of respect and obedience to her

family, but, in some of the stories, she reveals a certain level of independence, and power. However, she also reveals and validates her fragility as a child (in accordance with the social and cultural norms of the time) in some stories, such as, when she needs help and protection from an adult, and when she has no voice or active participation in everyday family situations. This fragility is accentuated in the other characters who represent children, such as the anthropomorphized animals that are «like people» to Dedé – especially the dog, the parrot, and the cat – but are only «animals» in the eyes of the adults.

In each narrative, the role of the adult characters – Tio Damião, Papa, Mama, Grandfather, Grandmother, Dona Amélia, Auntie, the cook, and the thief – is to assist the children, supporting their actions and those of the animals, sometimes punishing them, sometimes helping them with their tasks, sometimes telling them stories. Considering that all the stories in the series present a standardized, happy family, in addition to the idealization of the relationship between adult and child, the supporting power of the adults contributes to the stereotype of family social roles at the time, such as: the father has the last word, and it is the mother who takes care of Dedé.

Therefore, the adults are presented by generic terms, mostly using initial capital letters, in order to represent any fathers, mothers, grandparents, etc., and they demonstrate their power over the child, which is always portrayed as an example.

2.4. *Narrative time and space*

Developed in short time periods, these stories aim to portray reality objectively. This quest for objectivity defines the «natural» chain of events, in a linear chronological sequence that the narrated facts follow. There is no complexity in the chain of events, which can be measured as a number of days, through the alternation of day and night. There is, however, an exception in *Baianinha*, where *what* happens to the girl is described in advance, to make the reader curious and to encourage them to read on and discover *how* and *why* it happens.

The narration is timed so as to appear «natural», and its role is evident on several levels of the narrative axis. While conferring a sense of accuracy and truth to the narrated story as well as placing it in a precise and known time, this procedure also aims to make the book easy to read for the intended readers. The timing of the narrative is measurable in days, weeks, and months, at an accelerated pace in some stories and slow in others, but always seeking to remain coherent to the reader. The accelerated pace guarantees a dynamic narration, centered on action; and the slower one emphasizes the actions, drawing the reader's attention to specific details.

The past tense – recurrent in all the stories – is modified by the narrator, when he begins to «speak» in the present tense at the end of the narration. As well as indicating the presence and subjectivity of the narrator, this procedure is another attempt to create «reality» in the fiction. «Real» time is used to produce the desired effect in young readers: that of changing from the «egocentric world, which satisfies itself with unreal creations, [to the] socialized way of thinking, of standard, logical characteristics»¹⁹.

Urban space is prevalent in these stories. Although most of the books show no concern with defining the characteristics of a specific space, the actions of the characters suggest this setting, since they behave as inhabitants of the city, attending carnival dances, going to «rural areas» when they are sick, not accepting myths as true, and visiting the circus.

The urban setting relates to the growing process of industrialization and urbanization of the time, making the stories believable and allowing the reader to identify with the space represented, either through recognition, in the case of children living in cities, or through aspiration, for those living in the countryside. The space was predominantly represented aiming for effect that it is desired predominantly aesthetic, but, in most stories functioning only as a setting for the plot, seeking to «directly» represent reality.

The suggestion of a regional space in Brazil therefore serves to set the lesson of these stories: to teach Brazilians about Brazil. Meanwhile, the allusion to an indigenous space sets the scene and the parameters for the culture of the «white man». In this way, the space is emphasized in order to «recreate the dreams and fantasies» of a child's spirit with more balance, through the «realistic» scenes that are described, without caricatures²⁰.

2.5. *Thematic principles*

Education and nationalism are the key thematic principles of the stories in the series. Understood as a method of civilizing and distinguishing man, education is provided through teaching, favoring the soul, culture, and spirit to the detriment of the body, nature, and matter.

In the books *Totó* and *Papagaio Real*, the narrator highlights the importance of «teaching» – not «training» – the animals, which makes them more similar to the humans, and values them with «obedient» puppies and parrots becoming beloved and «royal», respectively.

¹⁹ M.B. Lourenço Filho, *Inquérito sobre livros para crianças*, «Leitores e Livros», vol. 9, n. 35, 1959, pp. 172-179.

²⁰ Lourenço Filho, *Inquérito sobre livros para crianças*, cit.

Although in both cases there is no direct physical punishment (as occurred in the «traditional school»), nor is the «teaching» given to the dog and the parrot considered by the narrator as a form of punishment, Totó is tied up on a leash, and the parrot is «threatened» by Dedé.

The theme of education is similarly explored in *Tão pequenino* and *Saci-Pererê*. The kitten «is not a person», but looks and suffers «like people do» in the eyes of Dedé, who, as a child, identifies with the fragility of the small animal. The legend of Saci, in turn, is enunciated by two points of view, in which the representatives of «modernity» are the «enlightened», as opposed to the old, the representatives of «ignorance». Thus, education and its importance permeate the stories, either to show adults as responsible for the «growth» of children, who are psychologically different individuals to adults, or to demonstrate the modern mentality - educated/civilized - as the best and most promising mindset.

Education is also a theme in *A Formiguinha*. After a traumatic experience, the little ant learns a «religious lesson», and understands why it was «freed». This Christian religious appeal seeks to highlight the figure of God as the creator of all things. The author used faith in a supposed «aesthetic» dimension, and it seemed that, through children's literature, he strategically aimed to help to ease the long discord between Catholics and liberals of the *Escola Nova* movement, regarding religious teaching in Brazilian public schools.

Nationalism, in turn, is explored in this series through the exaltation and recognition of Brazilian nature, people, and regions, in order to contribute to «Brazilianize» the Brazilian people, since, according to the author, that which is not known is not loved. In *Baianinha*, the State of Bahia is praised; in *O indiozinho* and *A irmã do indiozinho*, indigenous people and their contribution to national development are praised; in *A Gauchita* and *Maria do Céu*, nationalism is expressed with praise and enthusiasm for the people of Rio Grande do Sul and Ceará, respectively.

In the stories mentioned above, a euphoric tone presides over the descriptions of the states that compose each geographic region of the country, in a kind of nationalism, highlighted by the intense use of qualifying adjectives. The particular features of these states do not end there. There is also the question of language, embodied by the characters, especially by Rosa and Maria do Céu, which represent the linguistic specificities of their respective states in order to promote them.

The praise for Ceará deserves special attention, since it was there that the author lived and worked to reform the state's education system between January 1922 and December 1923, and his negative impressions of the region were recorded in a book later published²¹. Therefore, *Maria do Céu* appears to

²¹ The impact of this experience on the young Lourenço Filho was published in his book *Joaseiro do Pe. Cícero* (1926), that received the prize *Ensaíos*, in 1927, and its author assumed a Chair at the *Academia Paulista de Letras*, in 1929.

be an act of «redemption» by the author, in a kind of apology to the people of Ceará, through the exaltation of the state by the protagonist, the friendly Ceará state native who emphasizes: first, she is Brazilian, then she is Northeastern, but deep down, in her heart, she is from Ceará.

Bahia and Rio Grande do Sul, in turn, are other Brazilian states with which Lourenço Filho had a connection²². With the former, the connection is related to jurist Rui Barbosa²³ and to educator Anísio Teixeira²⁴, both Bahians with whom the author maintained intellectual relationships, and, in the case of the latter, a personal friendship. His connection with Rio Grande do Sul was through the assistance and counsel renovation of the school system, staying there for a month in the 1940s²⁵.

2.6. *Narrator and point of view*

In the stories of the series, the narrator occupies a greater role. He seeks to «talk» to the reader, while circumscribing his participation through questions/answers, but often judging directly the behavior of the characters.

The narrator sees the events and pretends to be neutral, but, knowing the story, he makes comments, responds to questions, and analyzes the situation. He seeks not only to set an example and to explain the «lesson», but also to bring the reader inside the narrative, to gain their empathy and to ensure their presence and understanding.

With regard to the objective of exemplification, the narrative models focus on a sequence of events that develops in the search for a balance to counteract the initially provoked imbalance. The behavior of the characters, the unfolding of the action, the occupation of space, the time elapsed – all these aspects lead to and affect the final result.

For this, the narrator organizes the narrative according to his own criteria and exposes his own point of view, ensuring his presence in the narrative to effectively participate in the daily life of the child characters, and therefore to make comments, analyze, and judge their behavior.

The decision to use grammatical subjects in the third person linguistically identifies the position assumed by the narrator, who seeks to penetrate the

²² These Brazilian regions were also in evidence in the literature published at the time.

²³ His admiration by Rui Barbosa was particularly noted in the name that he gave to his son, Ruy, and in an article and a book about the work of this jurist.

²⁴ This personal relationship is demonstrated in the *Manifesto*, and in «brotherhood», as Lobato named the group formed by himself, Lourenço Filho, F. Azevedo, and A. Teixeira.

²⁵ N.F. Abu-Merhy, *Lourenço Filho, administrador escolar*, in C. Monarcha (ed.), *Centenário de Lourenço Filho: 1897-1970*, Londrina, UEL, Marília, UNESP, Rio de Janeiro, ABE, 1997, pp. 91-122.

thinking of the characters and functions as a kind of «filter» through which the story flows. Thus, the narrator does not give up his omniscient point of view and, as such, leads the unfolding of events to establish the intended example. Various moments of the narrative demonstrate aspects that affirm the narrator's power over the narrated situation, either directly and explicitly, or by something a character says, highlighting the «good» and the «beautiful» according to his point of view, and seeking to guarantee the «truth» and «reality» of the narrated story to produce the desired effect on the reader.

Explaining his opinion as the «moral of the story», the narrator relegates the narrative axis to a secondary position and purposefully indicates the most direct, broad, and lasting meaning that each story represents: his apparent objectivity is, in fact, a way of trying to dissimulate the subjectivity of the adult narrator/author. In this sense, the words spoken by the characters, especially the «storytellers», are nothing more than the words «spoken» by the narrator/author, just as the organization of the narration as a whole is not the work of an «autonomous» narrator, but of the (dissimulated) author of the (real and empirical) books in the series.

Thus, although these stories are presented from an adult point of view, the regional events, types, customs, and aspects of Brazilian folklore are experienced/presented by characters of the same age group as the reader; they are on an «equal footing» with the reader. However, at this point, the narrator finds the limit of his power. Based on the needs of the intended reader's age range, and in accordance with his role as a «teacher» in the narrative who seeks the empathy of his reader, he is forced to quantitatively and qualitatively select information, and therefore does not have «total control» over the actions of the characters.

2.7. *Language*

In addition to the graphic aspects, the language used in the books in the series is another innovative aspect of its time.

In order to be suitable for the ages of the intended readers, the stories predominantly use very simple language: basic vocabulary and syntactic structures formed of short sentences, repetition, and an oral, colloquial tone for the time, which aims to make the reader feel closer to the narrator, demanding greater participation by the former, even if it is «directed participation».

According to Lourenço Filho²⁶, in texts aimed at children, the language used must have a dual function: to signal/inform and to suggest/create, with the latter being the basis for artistic character development in children's literature. This way, the language in these stories focuses on a question/answer model, in which

²⁶ Lourenço Filho, *Como aperfeiçoar a literatura infantil*, cit.

the narrator asks and responds, or the characters talk to each other. However, while giving the character a voice, the narrator «filters» and directly leads these dialogues, in accordance with the desired effect on the reader.

Even in the dialogues between the characters, the presence of the adult narrator is perceptible, since he gives the words spoken by the characters – including the child characters – an «adult position» regarding reality, like Rosa and Maria do Céu. However, the language is given a suggestive and creative element with the use of regional linguistic variations and the humor and suspense present on the narrative.

Thus, the language used in the books relates to two main aspects. The first is linked to an aesthetic conception aimed by the author, to whom language is an expression of art, «[...] having to obey the canons of harmony, of grace, of clarity»²⁷. The other aspect is connected to a pedagogical conception of education, in which the «beautiful» suggested by language must be guided by the usefulness it can provide and by the «good» it can achieve.

3. *Intertextual relationships*

As mentioned, in the *Series Histórias do Tio Damião* there are many graphical, editorial, and linguistic innovations in relation to the production of children's literature of its time. Similarly, the author wanted to show a way of making books for children that he considered representative of «good» children's literature. In these stories, he emphasizes the surprise and curiosity of children and does not present scary situations that could generate insecurity or conflict (as was common in children's books from the late nineteenth century and early twentieth century in Brazil). The targeting of a specific «age range» is also a significant sign of the innovation of the series, together with other characteristics indicative of the dialogue with the time: thematization of the urban space; contribution to an expanding publishing market of children's literature books, above all, through the series format, with the same characters appearing in a succession of stories.

These aspects also allow us to verify the relationship between the books in the series and other books and stories that preceded them, as well as aspects of the society of the time.

In the series, *Toto* creates a discursive exchange due to the fact that the name of this character is inspired by that of Dorothy's dog in the book *The Wonderful Wizard of Oz*, by Lyman Frank Baum (1st American edition, 1900). Although Toto in *The Wizard of Oz* is no more than a companion of the protagonist, that acts as nothing more than a dog, it still has various characteristics in common

²⁷ *Ibid.*, p. 159.

with Totó from the *series* – whose fur is long, black, and silky. Thus, the use of its name for Dedé's dog seems to suggest a traditional reference to dogs in general, as in «Totós». This reference to Baum's Toto has become a metonymy in Brazil that continues until the present day.

In *Baianinha*, the reference to the carnival – a ritual event that serves as a backdrop for the girl's mischief – is a direct reference to the popular party that grew so strongly in Brazil in the 1930s. In this sense, this citation, absorption, and transformation of the spectacle, with no stage and no separation of the actors and the audience, reveals itself as a particular intertextual relationship. The indirect allusion to actress and singer Carmen Miranda, through the costume and attitudes of the protagonist, relates to the importance of cinema and the growth and prominence given to the «samba schools» during that time.

Papagaio Real shares its title with *O Papagaio Real*, an enchanting tale told through oral tradition in which a parrot – like the one that belongs to Dedé – undergoes a metamorphosis. However, in the story from the series, the bird undergoes a transformation when called the «Royal Parrot», while in the traditional legend told through oral tradition, the parrot becomes a handsome and elegant boy. The transformation of Dedé's parrot, despite occurring in «reality» rather than in fantasy like the other one, is best understood when traces of identity are established from this tale, because if read in isolation, without knowledge of the enchanting tale, the transformation of the bird in this story is out of context, and not explained in depth. When referring to the bird as a «Royal Parrot», Dedé does nothing more than refer to the traditional tale, expecting an extraordinary transformation that does not in fact occur to her parrot.

A formiguinha is an adaptation of the tale *A formiga e a neve*, in which a series of events follow each other in a cumulative chain. According to Starling²⁸, this text is a typical example of a so-called «cumulative tale», shared through oral tradition and of African origin, but attributed by Carvalho²⁹ to Buddha, stating «[...] it is unlikely that a Brazilian legend, of African origin, is set in the snow»³⁰. In Lourenço Filho's adaptation, the scene is «Brazilianized»³¹, with the author of the text using «poetic license» to explain that mud is melted by the force of the sun, as was the case with the snow in the original version.

In these latter two stories, the folklore appears revisited, serving as a base material for recreations that maintain a dialogue with the oral tradition, folklore revealing itself as another particular intertextual relationship for children's

²⁸ N. Starling, *A formiga e a neve*, in B.V. Carvalho, *A literatura infantil - visão histórica e crítica*, São Paulo, Global, 1985.

²⁹ Carvalho, *A literatura infantil - visão histórica e crítica*, cit.

³⁰ *Ibid.*, p. 39.

³¹ A.M.C.S. Menin, *O patinho feio, de H. C. Andersen: o "abrasileiramento" de um conto para crianças*, Doctoral Thesis, Department of Literature, Assis, São Paulo State University, Academic Year 1995-1999.

literature. Folklore also served as a source of inspiration for another stories in the series: through the legend of Saci-Pererê, in the book of the same title, and through the songs, poems, and riddles of oral tradition that are present in *A Gauchita* and *Maria do Céu*.

Saci is one of the most popular and well-known folk legends in Brazilian literature. Like other legends that have become myths, Saci was sociologically conceived in connection with certain social structure, and is presented in the book *Saci-Pererê* through the contrast between old mentalities and modern thinking; the myth is irrational and emotional, opposed to scientific and rational thought.

In *A Gauchita* and *Maria do Céu*, aspects of Brazilian folklore are presented with an informative rather than fictional function. This characteristic indicates the proximity of these two books to the famous – obligatory reading at the time – *Através do Brasil* [Throughout Brazil] (1910), by Olavo Bilac and Manoel Bonfim. To this series, in turn, refers *Viagem através do Brasil* [Traveling through Brazil], another series organized and revised by Lourenço Filho, between the 1940s and 1950s, and published by Melhoramentos. In those two books from the series *Histórias do tio Damião*, this relationship is also revealed by highlighting natural riches, beautiful landscapes, culture, and regional customs associated with the greatness of the people from each region of the country, expressed through love for the country, sharing Brazil with Brazilians in order to praise and appreciate the country.

As for the «dialogue» between the stories within the series, it is not as frequent as one might initially suppose. The continuation of characters in the different stories of the series does not guarantee the resumption of aspects along them, except in the following cases. In *A irmã do indiozinho*, Dedé alludes to the story of the previous book, *O indiozinho*, even though two years have elapsed between their publication. In *A Gauchita*, Rosa refers to Dedé as «Baianinha», closing the four-year gap between the publication of the two books and the lack of references to Dedé as «Baianinha» in the stories that preceded it.

Among the intertextual relationships suggested by the reading of these stories, there are at least two aspects that must not be ignored: the connections with the work of Brazilian writer José Bento Monteiro Lobato (1882-1948) and the pedagogical ruralism movement.

In the series under analyzes, there are several links to Lobato's texts for children, through the characters and their function in the narrative, such as between Dedé/Narizinho and Tio Damião/Dona Benta. There are also similarities regarding the presence of the legend of Saci in texts by both writers, but with different approaches and interpretations. In *Sacy-Pererê: resultado de um inquérito* [Sacy-Pererê: the result of an inquiry] (1918), Lobato emphasizes the need to study our legends and creeds in order to achieve cultural independence. However, Lourenço Filho emphasizes representation of the urban space, which accentuates their silence in relation to the rural space. This silence is eloquent,

especially for reasons related to the «climate of the time» and the relationships of Lourenço Filho through his professional career. More directly related to the theme of this paper, may be cited: the strong presence of the rural space in works by Lobato, as well as of two other contemporaries, who defended the rural education movement: Tales de Andrade, author of *Saudade* [Missing]³², and Sud Mennucci, author of *A crise brasileira da educação* [The Brazilian Education Crisis] (1930)³³. Besides, may be mentioned the disputes (to which he was no stranger)³⁴ regarding the political project of the Nation-State between those who defended the common school system and those who advocated specific rural schooling, especially from the 1930s onward, due to the growing exodus of the rural population to the cities in search of better living conditions.

4. *The series within the work of Lourenço Filho*

The series under analyses contributed to the constitution of Brazilian children's literature, highlighting the importance of the genre. To achieve this, the writer transformed himself into the *author* of a series of original books, with the aim of adapting them to the reader's age range, and impacting the children's literature market. In addition, he sought to reconcile the writer's desire to disseminate his work with publisher's desire to sell books on a large scale³⁵. Thus, he decided to thematize the daily life of children, who, as characters, moved from one book to another, emphasizing the formative character that he attributed to his books in a way that was linked to the education project that he defended.

To this end, the series was produced and published under the auspices of a major publishing house, that excelled in the production of children's literature, and the books circulated as a series, making explicit the close relationship between the author's children's literature and the publishing market³⁶.

³² *Saudade* is considered by some Brazilian historians of education to be the first book of children's literature by a Brazilian writer. This recent interpretation contrasts with those of Arroyo and Lajolo; Zilberman, who consider Lobato the founder of this genre in Brazil, based on the aesthetic quality of his texts for children, in comparison to the previous instructional style of books for use in elementary schools, such as those by Tales de Andrade.

³³ On 08/06/1933, this Academy awarded this book in the «Francisco Alves» Prize, in the category of «What is the best way to disseminate elementary education in Brazil».

³⁴ Since the 1950s, Lourenço Filho also dedicated himself to the issue of pedagogical ruralism, sharing his studies in some publications.

³⁵ M.B. Lourenço Filho, *Parecer a Dona História da Silva*, Rio de Janeiro, 1961.

³⁶ This relationship highlights the functions he performed at the Companhia Melhoramentos, as publishing consultant, director and curator of the Children's Library collection, replacing Arnaldo Barreto (1869-1925). Lourenço Filho revised and adapted the books of this collection, until 1957, when it had completed one hundred titles.

Thus, Lourenço Filho «concretized» a (characteristically ambiguous) way of thinking about the genre. But, at the same time as distinguishing himself as an innovator, he was linked to the utilitarian-instructional tradition that characterized texts for children. His literary and aesthetic conceptions were connected to educational, editorial, and psychological conceptions, which functioned as a «brake» applied to innovation.

In accordance with the principles and conceptions of reading defended by the author, the function of this type of text was aesthetic education and not the diffusion of civism and patriotism. However, his production of children's literature found their limits in the way the writer understood the intended reader of the books in the series: a *recipient* of «mental, emotional, and cultural» education. In consequence, on the one hand, the books of this series have distanced themselves from important socio-political aspects of their historical period of circulation, by betting on the notion that children are «pure» and do not need this «time of horror». On the other hand, they approached these aspects by propagating a sense of nationalism, based on educational renovation and the consequences of its doctrinal nature in defining the direction of educational policy in the decades after 1930.

From this point of view, the series can be seen as a concretization of Lourenço Filho's key principle: children's literature serves to *educate* children in terms of internal maturity and to guide the constitutive options of these types of books. This «education» became a project that involved the formation of «logical, social, and moral» values, to encourage the nation's social progress.

Although current literary criticism does not accept that literature is primarily considered by the principle of utility, which would unbalance its aesthetic constitution, this notion still exerts a great influence on the production of children's literature at this time. To this end, the production of children's literature by Lourenço Filho's contributed strongly, founding a tradition related to the way of thinking *about* the genre.

This founding character is correlated to temporal concomitance and ideological complementation between the production of the books in this series and the other works of its author, especially the most direct intersection of three facets of Lourenço Filho: writer, educator, and editor.

His writer vocation was subsumed by the talent as educator, and of this inflection resulted that «[...] the work of writer Lourenço Filho, [which] from the first half of his life (1930) is already considerable in volume, is still relatively small compared to the volume it will reach forty years later (1970)»³⁷. And his emphatic concern with education – according to the principles of *Manifesto of 1932* – pervaded everything he did, especially from the 1920s onward, also influencing his work in the fields of psychology and psychometrics and his

³⁷ R.C.B. Lourenço Filho, *Lourenço Filho, escritor*, in Monarcha (ed.), *Centenário de Lourenço Filho (1897-1997)*, cit., pp. 17-46.

textbooks and children's literature. Regarding to the facet as an editor, it must be highlighted his great work at Melhoramentos, that started in 1926, when he became director of the *Biblioteca Infantil* (Children's Library) collection. He also acted as editorial consultant, issuing thousands of opinions on textbooks and children's literature and advising authors of these texts, earned him the epithet «the second ego» of Melhoramentos³⁸.

And in this field, yet, he directly and indirectly contributed to the production of children's literature and to the development of pioneering thematizations and normalizations about these books, through, in addition, the production of papers and his participation in the *Comissão Nacional de Literatura Infantil*. These contributions, together with Lourenço Filho's other related activities, constitute what can be considered as the basis of Brazilian children's literature theory and criticism³⁹.

The representativeness of this aspect of his work can also be observed in the posthumous homage he received, as patron of Chair No. 11 of the *Academia Brasileira de Literatura Infantil* (Brazilian Academy of Children's Literature)⁴⁰, created in 1978.

Final Thoughts

Having being produced at the intellectual maturity of its author, and despite being a less extensive (but no less important) chapter in his career as well as in Brazilian children's literature, the series analyzed should not be interpreted as merely episodic or incidental, nor as an attempt to resume his writing facet, which began in his youth⁴¹.

It is impossible to know the reasons for the brevity of this production, but indications available in the extensive bibliography on this educator and his work may lead to some conclusions. As example, may be mentioned his connection with the initiatives of writer and editor Lobato, his companion in «brotherhood»⁴², or to the desired «resolution» of the ambiguity between

³⁸ H. Donato, *Cem anos da Melhoramentos*, São Paulo, Melhoramentos, 1990, p. 88.

³⁹ This lasting influence of Lourenço Filho can be seen, more directly, relating to all his didactic production and theoretical production on how to teach reading and writing. In this regard, see: Mortatti, *Os sentidos da alfabetização*, cit.

⁴⁰ This Academy was founded in São Paulo city on 21/03/1978. See M, Tahan, *Os 40 imortais da literatura infanto-juvenil*, «Jornal do Brasil», [s.d.].

⁴¹ Despite being involved in journalistic and literary activities since childhood, his work was first published from 1915 to 1921. L. M. S. Lourenço, *Artigos em jornais*, in Monarcha, Lourenço Filho (edd.), *Por Lourenço Filho*, cit.

⁴² This hypothesis regarding the possible influence of Lobato's on Lourenço Filho's, especially as a writer and editor, deserves detailed research, to be developed in next texts.

literature and education (that characterizes the books in the series) through the reconciliation of his three facets as mentioned.

As an indication of the transition from «pedagogical publicist» to «didactic author», his later work on these subjects was marked by an emphasis on didactic, pedagogical, and editorial objectives, according to the principles he defended and the criteria he used to evaluate books and advise authors in his role as editor and consultant at Melhoramentos. These same principles marked his books for circulation in a school context (primers, textbooks, teaching guides), which he began in 1928 with the *Cartilha do povo* (*People's Primer*), and was resumed at the successful *Série de Leitura Graduada Pedrinho* (Pedrinho Graduate Reading Series) (1953-1957)⁴³.

Alongside wide recognition, however, Lourenço Filho was also criticized, especially since the 1980s, when, driven by the end of the military dictatorship in Brazil, educators and historians of education began to question the (neo)liberal principles that he (and the group of intellectuals) have defended for education and society, as a protagonist and exponent of the *Escola Nova* movement. They also questioned his collaboration with the New State regime⁴⁴, and his defense of theses in psychology applied to education that demonstrated a prejudiced understanding (in current terms) of the cause of social and educational inequalities, for example.

Despite these questionings, a common element stands out among his defenders and critics: he was, above all, an (organic) intellectual, who occupied a prominent social and political position in the public debate on education, having earned national and international authority and prestige. His decisions and actions were marked by reformist spirit, by a catalyzing character, and by the pioneerism in founding traditions⁴⁵. These marks, that are verifiable to this day (although sometimes contestable) in the range of fields in which he has worked, characterize his «[...] role at the vanguard - placing himself in a position to exert influence, rather than receiving it, [and agreeing with] major international authorities on the matter»⁴⁶.

These characteristics are also present in the series analyzed, which represents yet another facet of the educator's intense activity as a writer of children's literature. This can be seen in the series as a «concretization» of the way «founded» by Lourenço Filho of *thinking about* the genre, whose principles were equally formulated through dialogue with the production of children's literature by other authors, with influences still today.

⁴³ This series also shows the intertextual relationship with the Lobato's work, in which Pedrinho is also the name of a character that moves between various stories.

⁴⁴ For detailed information about his activities during this period, see: Monarcha, Lourenço Filho (edd.), *Por Lourenço Filho*, cit.

⁴⁵ Mortatti, *Os sentidos da alfabetização*, cit. and Bertolletti, *Lourenço Filho e Literatura Infantil e Juvenil*, cit.

⁴⁶ *Ibid.*, p. 145.

This series can therefore be considered a model for those interested in writing, editing, and teaching children's literature, based on educational and psychological concepts consistent with the concepts of children and education, as well as with the function of literature within the scope of the *Escola Nova* ideology. Through the books of this series, Lourenço Filho recorded and taught an interpretation of Brazil (and Brazilian childhood) to the children of that time, as well as a way of writing and editing texts for children and teaching through children's literature, to adult writers/editors/teachers of that time and beyond.

«Youth was never this united»?*

Manifestations of social injustices within the *Hitler-Jugend* and ways of systemizing those

Jakob Benecke
Faculty of Philosophy and Social
Sciences
University of Augsburg (Germany)
jakob.benecke@phil.uni-augsburg.de

ABSTRACT: The NS-regime was, generally speaking, not interested in an outright levelling of social differentiation patterns, as they were present within the German society around 1933. On the contrary: old hierarchies were to be fought and new ones were to be established – both according to the Nazi administration's social ideology and, deriving from it, its racial ideology. The *Hitler-Jugend* [henceforth *HJ*], the Nazi's youth organization, can be subsumed under this conclusion. The following contribution will investigate in how far phenomena of social injustice appeared in the Nazi youth organization and how these can be classified systematically by using selected examples. This represents an attempt – never seen in educational-historical research with respect to the Nazi regime – at systematically analyzing the issue of social injustices in the research field concerning the, which on the one hand is almost unmanageable¹, but on the other hand shows numerous desiderates.

EET/TEE KEYWORDS: Research of historical socialization; Youth organization; Social inequality; National socialism; Hitler-Jugend; Germany; XXth Century.

* «Nie war eine Jugend so vereint» (authors translation). Quoted from a poster of the *HJ* area Swabia, HJ-Banne Memmingen, Staatsarchiv (National Archive) Augsburg (StA) S 4234.

¹ After all, with respect to the topic of the *HJ* in general «it is unknown [...] how many German publications or how many publications in other most common foreign languages in Germany [...] exist» (author's translation. All quotes are translated into English by the author unless stated otherwise). U. Wiegmann, *Die Hitlerjugend als Gegenstand bildungsgeschichtlicher Forschung*, in Ch. Ritzi, U. Wiegmann (edd.), *Behörden und pädagogische Verbände im Nationalsozialismus. Zwischen Anpassung, Gleichschaltung und Auflösung*, Bad Heilbrunn, Klinkhardt, 2004, pp. 11-32 (quot. on p. 12); transl.: *Hitler-Jugend as subject of educational-historical research*, in Ch. Ritzi, U. Wiegmann (edd.), *Authorities and pedagogical associations in National Socialism. Between adaptation, levelling, and dissolution*.

Introduction

Social inequalities within the *HJ*? If one believes the contemporary witnesses' recollections, as well as the presentations in plenty of publications with respect to the Nazi youth organization, it appears that the phenomenon's development was clarified and in its manifestations rarely contradictory – at least in times after the National Socialists' assumption of power. The areas of a collective «inclusion» policy within a national community», and a marginalizing exclusion, which the alleged «alien ethnicities», the «non-hereditary healthy» or the politically «unreliable» people had to face, stood side by side in a supposed clarity. According to colportage, *HJ* measurements taken on the action level to ensure an efficient «conformity» of a racially defined affiliation group on the one hand and defaming and oppressive rejections of the above mentioned excluded groups on the other hand, complemented the specific and ideologically limited, as well as propagandistically proclaimed NS assumption of power at youth policy level². In such representations of the *HJ*, however, central social patterns of differentiation in the organization are overlooked: For example, the multifaceted gray areas of inclusion within the in- and exclusion areas, which will be taken a closer look at in this contribution. Furthermore, there are the hierarchies creating social injustice within the *HJ*³, as well as the dynamics of NS policies, which are – analytically speaking – especially important as they clarify that in order to achieve a valid understanding in this field of research the phenomenon analyzed needs to be considered in a dynamic rather than a static perspective. The latter also agreed with the findings of adolescents who experienced the superimposition of the «contradictory» impressions in their «areas of life [...] under the swastika»⁴. The dividing lines between in – and exclusion were – certainly intentionally – defined in a vague manner. Additionally, the regime or rather its responsible functionaries, all above the *Reichsjugendführung*, which was the NS youth organization's leadership that followed Hitler blindly, interpreted and applied the limitations and regulations with regard to their reign. At the same time, a static perspective with respect to

² Evidence for that can be found in specialist publications, NS propaganda, and eye witness accounts in J. Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, Weinheim, BeltzJuventa, 2015, pp. 13-19; transl.: *Social inequality and Hitler-Jugend. On systemizing social differences in the National socialist youth organization*.

³ Cf. the increased establishment of patterns of social inequality within the *HJ* due to the implementation of the graded, hierarchical «Führer» principle in the NS youth organization, as well as the subdivision in *HJ*-special units, which were equipped with various focuses with respect to legitimation and tasks: *ibid.* pp. 60-71, concerning the regulations with respect to the «Sonderbanen» cf. Policy manual of the *Hitler-Jugend* (VHB. HJ), 2nd ed., 1942, pp. 48-52.

⁴ D. Peukert, *Volksgemeinschaft und Gemeinschaftsfremde. Anpassung, Ausmerze und Aufbegehren unter dem Nationalsozialismus*, Köln, Bund-Verlag, 1982, p. 175; transl.: *National community and non-community members. Adjustment, culling, and rebellion in National Socialism*.

the NS youth organization can also lead to the belief that the alleged selectivity of its inner patterns of social differentiation, such as the gender specific *HJ* experiences in the *Bund Deutscher Mädel (BDM)* the female unit of the *HJ*, or the male *HJ*, are overrated⁵. This approach, however, can cloud one's judgment with respect to the NS-regime's superordinate interests in power and its fully functionalized view on «its» entire youth⁶.

Although controversial evaluations regarding the *HJ* history and its perception are still being published, thematically relevant research has comprehensively shown that the functionally forming enforced conformity of the adolescents in a national community was never truly achieved as intended by the NS-regime⁷. After all, what is true for the NS reign in general also applies to the *HJ*: The assumptions made with respect to the development of social inequalities under the aegis of the NS-regime should not be based on propaganda or eye-witnesses' accounts only, as one should, similarly, not compartmentalize when a form of existence was only proven singularly.⁸ It rather calls for an empirically differentiated analysis in order to be able to make representative propositions with respect to the actual spread of the analyzed phenomena.

1. *Social inequalities as an element of the Hitler-Jugend – the differentiating aspects of time and age*

The chronological development of the *HJ* can be split into four definable stages. Within these stages the National Socialist youth organization as a part

⁵ Cf. relevant topic of the inner organisational subdivision into a female (*Bund Deutscher Mädel – BDM*) and a male (*Hitler-Jugend*) partial group (both combined represented the *Hitler-Jugend*); Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 172-189.

⁶ During the NS regime, education represented a tool, based on the ideologically functional and extended concepts, to ensure power. Therefore, the regime defined education in a functional dependency of its political reign and its goals. J. Benecke, *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftlicher und politischer Bedingungen sowie deren biographischer Bedeutung*, Saarbrücken, Südwestdeutscher Verlag, 2011, pp. 368-377; transl.: *Socialization in NS times. A systemizing analysis of societal and political conditions as well as their biographic meaning*. Regarding the *HJ*: Id., *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, Weinheim, BeltzJuventa, 2013, pp. 55-60; transl.: *Hitler-Jugend 1933-1945. Political agendas, every day life, memories. A documentation.*; Id., *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, Weinheim, BeltzJuventa, 2015, pp. 21-26.

⁷ M. Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, 2nd ed., München, De Gruyter Saur, 2003, p. 149; transl.: *Total education for the 'total' war. Hitler-Jugend and Nazi youth politic*.

⁸ N. Kramer, A. Nolzen, *Einleitung* (transl.: *Introduction*), in Idd. (edd.), *Ungleichheiten im «Dritten Reich». Semantiken, Praktiken, Erfahrungen*, Göttingen, Wallstein, 2012, pp. 9-26 (especially pp. 11-13); transl: *Inequalities in the «Third Reich». Semantics, Practices, Experiences*.

of the Nazi rule faced changing and situationally adjusted attributions of meaning, as well as tasks. It can be distinguished as follows:

1. a prehistory of the assumed time of origin or the «fighting time» (1922 or rather 1926, and respectively 1923 or 1932 until 1933 for the BDM); 2. a stage of enforcement (1933 to 1936); 3. a stage of youth labor or the «education» (1936 to 1939); 4. a last stage during the war (1939-1945). According to the precise moment of the respective membership, the *HJ* experience could be quite different⁹. This already uncovers one dimension¹⁰ of social inequality with respect to *HJ* membership: the time or rather the point in time of membership. The latter could, depending on the period of time of the membership, contain differing potentials for experiences. This was due to the fact that there was an adventurous nature that suggested voluntariness (first stage) on the one hand, and a compulsory and obligatory life-and-death war on the other hand (end of the last stage), both of which appeared antagonistic, but were simply dependent on the stage in which one became member of the *HJ*¹¹. Here, suggesting a relativization of partly colported quotas with respect to the *HJ* related strategies of recruitment and their efficiency becomes necessary¹². It can be found that an increasing volition of recruitment marked the regime's youth policy after the Nazi's assumption of power. Thus, a remarkable increase in the number of members for the *HJ* was achieved. The collection quota of the youth organization reached – considering the entire organization without its internal differentiations

⁹ Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 22-51.

¹⁰ The conception of certain dimensions of social inequality results from the effort of bundling up heterogeneous phenomena in order to make them analytically manageable. S. Hradil, *Soziale Ungleichheit in Deutschland*, Opladen, UTB, 2001, p. 31; transl. *Social Inequality in Germany*. «This is why the manifoldness of specific appearances in certain areas was summarized in prescribing categories. These categories are labelled as 'dimensions' of social inequality. Materialistic wealth, power, and prestige are dimensions of social inequality that can and could always be found in all known societies, although they certainly presented themselves in different specific phenomena» (*ibid.*).

¹¹ The NS-regime's functional access to youth culminated in a massive and increasingly radicalized military service of the *HJ*, which had always been the goal dimension of the service's practices and the education applied within the *HJ*. In order to fully understand youth policy of the time, as well as the regime's clearly functional motives with respect to the youth – which become quite obvious here – one has to take the meaning of war involvement of the *HJ* into consideration, which has not yet been sufficiently done in many representations and research on contemporary history. Due to existing sources, especially their magnitude and heterogeneity, the *HJ*'s military services can hardly be collected systematically or comprehensively in a qualitative or quantitative manner. This was even difficult to the *Reichsjugendführung*. A systemized overview of further sources and bibliographical references can be found in Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 42-51.

¹² For a differentiated analysis of the quotas of acquisition in the *HJ* as well as the respective sources and bibliographical references see Id., *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 28-29 as well as differentiated statics in Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., pp. 288-289.

of its subdivisions – a peak in membership of up to 85.1% in 1939 after the commencement of the *implementing order* (*Durchführungsverordnung*) of the *HJ* law enacted in 1936, as well as the beginning of the military service of the *BDM* and the male *HJ*. This collection quota was remarkable, but did not concur with the numbers aimed at in 1939, namely 98.1%; a number which was certainly pitched too high¹³. Although the realized inclusion efficiency is quite remarkable in an educational-historical point of view, it does not correspond to the apparently hopeless inclusion of youth back then conducted by the NS youth organization, which was often recorded in colportage¹⁴.

The previously mentioned aspect of a differentiation of the *HJ* inclusion which depended on the time, points at another source of social inequality with respect to membership to the youth organization, which was also a superimposing criterion of heterogeneity, namely the subjects' age. With respect to this criterion, the regime had two different strategies that found its binding framing on the meta-level in a comprehensive aspiration for inclusion towards the entire national community: one the one hand, there was an entitlement for education, which was to last a lifetime and was not be limited to certain stages of life; on the other hand, the measurements for inclusion applied functionally were age specific. With regard to the youth organization of the *HJ*, the latter became effective in a differentiating manner by fixing a certain age necessary to enter the *HJ*, as well as by assigning different age groups within the organization to different subdivisions of the *Hitler-Jugend*¹⁵.

¹³ K.H. Jahnke, *Jugend unter der NS-Diktatur 1933-1945. Eine Dokumentation*, Rostock, Ingo Koch, 2003, p. 38; transl.: *Youth under the NS dictatorship 1933-1945. A documentation*. M. Kater, *Hitler-Jugend*, Darmstadt, Primus, 2005, p. 25.

¹⁴ Concerning the topics of divergent youth and those who deliberately escaped *HJ* service see Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 77-82, as well as numerous documents presented there. Also considering the discussed issue: Id., *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 75-85, as well as the oftentimes undifferentiated, traditional attributions of the situation relativizing: *ibid*, pp. 221-233.

¹⁵ On the female side the age was 10-14 for the *Jungmädel* (*JM* (young girls), starting at age 14 up to 18 years the *Bund Deutscher Mädel* (*BDM*), afterwards one had the opportunity to join the *BDM* subdivisions of *Glaube und Schönheit* (*Belief and Beauty*) until reaching the age of 21; however, registration quota can only be estimated today. G. Miller-Kipp, «*Der Führer braucht mich*». *Der Bund Deutscher Mädel (BDM): Lebenserinnerungen und Erinnerungsdiskurs*. Weinheim, Juventa, 2007, p. 21; transl.: «*The Führer needs me*». *The Bund Deutscher Mädel (BDM): Memories and its discourse*. Considering the male adolescents they were supposed to join the *Deutsche Jungvolk* (*DJ* also called *Pimpfe* (*German young folks*)) at age 10, between the ages of 14 and 18 they were to join the *Hitler-Jugend* (cf., figure «*Structure of the Hitler-Jugend*» in VHB.HJ, Ed. II, 1942; printed in Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., p. 271.

2. *Social inequality as a characteristic of the Nazi regime and its manifestations on the level of its youth organization*

In order to analyze the organizationally specific momentum of social inequality in the *HJ*, its agenda, and its practices, it is necessary to define what social inequality in general means. I have chosen to follow Reinhard Kreckel who states:

Social inequality appears wherever the possibility of access to generally available and desirable social goods and/or social positions, which are equipped with unequal opportunities for power or interaction, shows permanent restrictions; thereby compromising or favoring life opportunities of the affected individual, group or society¹⁶.

In this case, the «access» to «desirable social goods» or «positions» represents a primary criterion for differentiation. Depending on this primary criterion is, secondarily, the difference with respect to the available «opportunity for power» and «interaction», as well as, tertiary, the «life opportunities» of those affected. With respect to the historic youth organization, it can be stated that the primary criterion of «access» already caused the establishment of systematic patterns of social inequality. The central motive, namely «race», was gradually complemented by other ideological motives which were useful to the Nazi-regime, all of which were then translated into a stage-specific practice used in order to achieve the *HJ* specific in- and exclusion efforts. Taking a closer look at the actual recruiting practices, however, one can find surprising indications showing that the relay did not follow a simple, sole racist, and black-and-white dichotomy of in- and exclusion. Rather, it can be found that the nationalizing collection of adolescents led to different gray areas with regard to the comprehension. Therefore, it remains to ask about the principles, undergoing constant readjustments rather than being static, which determined the »dynamic order of inequality»¹⁷ within the NS ruling system and its youth organization. As superordinate dimensions we can generally assume there to be power and racism. The first was particularly effective in the shape of actually exercised power; the latter represented the applied racism or propagandistically propagated racial ideology that generated inequality directly and indirectly. It is widely known that the exaggerated, needs-based, and instrumentalized implementation of the NS-ideology's central elements, (namely racism and – deriving from it – anti-Semitism and the conquest of living space) and its political exercise of rule characterized the ideological charge of the NS-regime's actions, especially with regard to a population policy level¹⁸. Not only characteristic for

¹⁶ R. Kreckel, *Politische Soziologie der sozialen Ungleichheit*, Frankfurt am Main, Campus, 1992, p. 17; transl.: *Political Sociology of social inequality*.

¹⁷ Kramer, Nolzen, *Einleitung*, (transl.: *Introduction*), cit., pp. 9-26 (especially p. 9).

¹⁸ Benecke, *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftlicher und politischer Bedingungen sowie deren biographischer Bedeutung*, cit., pp. 151-323.

the NS-regime in general, but also resoundingly effective in forming inequalities within social practices in the *HJ*, was the interplay between the two main motives, the political and propagandistic support of an implementation of the ideological maxims, as well as the safeguarding or the constant expansion of power. The relation of these two aspects was circular: The ideology functioned – on a mental level- as a motivator and basis for legitimization of the exercise of rule, which at the same time was supposed to be the condition and enforcement of an active implementation of the ideological premise. Depending on the stage-specific dimensions of NS politics one could either expect a consideration in favor of the exercise of rule or an unrestrained enforcement of the ideology. In order to be able to systematically grasp and explain the apparently contradictory *HJ* specific phenomenon of inequality of the gray areas of inclusion, which have been mentioned earlier and will be explained further below, one has to take the moments of differentiation, the structure of interdependency of ideology and rule, and the difference between the single stages and levels of the NS-regime¹⁹ into consideration. Thus, the above mentioned dimensions do not represent master dimensions that raise the claim of being the only reason for the origin of social inequalities during NS times. Instead, these two dimensions – and especially the interplay between them – embody an NS-typical and superordinate framing for the regime's agitation with respect to its population policy and, embedded in it, an educational agitation²⁰. As such, they characterized manifestations of social inequalities in specific manners, but did not predispose them entirely.

Thus, in a concentric circle, in whose center there is the respective concrete manifestation of social inequality in the *HJ*, one can find the following two causative progresses: 1. a direct implementation of the framing's effects on the *HJ* level; 2. an origin of respective social differentiation due to the relation between the framing and other, mostly traditional, patterns of differentiation, as for example the space where it was enforced, sex, generation or environment²¹.

¹⁹ This refers to the general separation, affecting all of the regime's educational measurement also including all activities of the *HJ* as Nazi youth organization, between propagandistic transcription (1) of a measurement and the objective connected to it, the actual political intention (2) behind it, its specific agenda and practice (3), its subjective perception of those involved (4), and, finally, the potential after-effects of their experiences shown in their biographies (5). The same measurement could manifest itself entirely differently on all of these levels and could, therefore, be the cause for social inequality in different ways. Numerous of the NS-regime's phenomena of social inequality, and the contradictions that apparently characterized them, can only be understood by analyzing the differentiation of these levels.

²⁰ H.-E. Tenorth, *Eugenik im pädagogischen Denken des nationalsozialistischen Deutschland – Rassismus als Grenzbegriff der Pädagogik*, in K.-P. Horn et al. (edd.), *Pädagogik im Militarismus und im Nationalismus. Japan und Deutschland im Vergleich*, Bad Heilbrunn, Klinkhardt, 2006, pp. 33-44 (quot. on p. 43); transl.: *Eugenics in pedagogical ways of thinking in Nazi Germany – racism as a border concept of pedagogy*, in *Pedagogy in militarism and nationalism. A comparison of Japan and Germany*.

²¹ These relations cannot be taken a closer look at due the lack of space in this contribution. See Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 172-233.

Although this list does include relevant, influential factors, it could be defined in a more elaborate manner if one considered other determinants²², such as economic assets. In relation to our topic, the generally effective factors of time and age of the *HJ* members, which had already been mentioned above, additionally influence social differentiation.

3. *The central dimensions of social inequality in the NS system*

a) *Power (dimension) or reign (determinant)*

In the present context, the amorphous category of power, which in its conceptual interpretations addresses and formulates heterogeneous references, can be defined according to Stefan Hradil. It is understood as «every relevant influence [...] that one part of society has or can have on another part of society, without the latter part being able to escape said influence»²³. After the political takeover in Germany, the NS-regime gradually transformed its rule into an exercise of power²⁴. The latter united many elements of interference (changing of existing relations in order to concentrate, expand, and ensure power) and access (recruiting, controlling, and (military) «service») which formed the cause for social inequality in the context of the National Socialist youth policy, as well. In order to analyze the Nazi era, the above mentioned definition requires a differentiated addition: apart from the exercise of power, the Nazi regime's agitations are characterized by their efforts in constantly expanding their power,

²² «Determinants of social inequality mean social positions of people in networks or relationships, such as sex, age, profession, geographic area, ethnic belonging, cohort (year of birth) none of which represent a betterment or worsening in itself, but can very likely bring them about» (see Hradil, *Soziale Ungleichheit in Deutschland*, cit., p. 34).

²³ S. Hradil, *Die Erforschung der Macht*, Stuttgart, Kohlhammer, 1980, p. 22; transl.: *Researching power*.

²⁴ In this context we can find the *HJ* to have been greatly involved in the exclusion (always structural and oftentimes including a physical or psychological use of force) of those parts of the population described as belonging to an «alien ethnicity» and thus the resulting creation of social inequality. As Nazi youth organization, the *HJ* and numerous of its members were involved in the offenses and crimes against those of «alien ethnicity», those «foreign to the community», and political opponents (the latter particularly with respect to other youth organizations that allegedly destabilized the Nazi power, especially «bündische Jugend» (= «youth in federations») (VHB. *HJ*, Ed. II, 1942, p. 1068ff.). This took place in the first two stages of the Nazi reign (1933-1939) and increased until it reached a peak in the targeted use in killings of (mostly Jewish) concentration camp inmates in the so-called *Todesmärschen* (*death marches*) during the evacuation of the concentration and extermination camps. With regard to this range of topics, which embodies a great lack within historic-educational research, cf. a more comprehensive and differentiated view in Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 51-53; Id., *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 55-60.

as well as their fear of losing loyalty, and thus power²⁵. The process of the *HJ* related creation of inequality in consequence of the NS regime's assumption of power can now be analyzed with the help of a rarely known or examined, yet quite significant example: the *Warnkartei*, an index listing people excluded from the *Hitler-Jugend*, used within the *HJ*.

The HJ's Warnkartei as a sanction-related source for social differentiation

The *HJ*'s own *Warnkartei*²⁶ represented disciplinary administration unit that autonomously manifested the social differentiations with regard to the organization²⁷. It included all of the exclusions from the *HJ* and all its subdivisions²⁸. On the one hand it could ensure that the already implemented exclusions could be enforced permanently; on the other hand it could increasingly result in additional momentums of inequality in the NS ruling system in terms of a stigmatization of those affected. Thus, an existing *Warnkartei* could prevent a future admission to the NSDAP. The *Warnkartei* listed little and much formalized biographic information²⁹ on those affected, as well as the mostly categorized reasons for the individual's exclusion from the *HJ*. The people mentioned here were considered to be deviating from the regime's behavioral norms, and thus needed to be sanctioned permanently. The *Warnkartei* represented a basis of further reaching, cumulative exclusion in the NS ruling system that was to prevent «adolescents who proved to be harmful elements in the *HJ* and who were, in consequence, excluded from it, to have the opportunity of participating in a different NS-formation»³⁰. It eventually

²⁵ Id., *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftlicher und politischer Bedingungen sowie deren biographischer Bedeutung*, cit., 2011, pp. 741-808; especially with regard to the *HJ*: Id., *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 78-82.

²⁶ Bundesarchiv (Federal Archive) Berlin-Lichterfelde (BArch) NS W B0001-0007. The *Warnkartei* are organized alphabetically and are distributed among the following signatures: B0001: Ba–Da; B0002: Da–Gu; B0003: Gu–Ke; B0004: Ke–Mü; B0005: Mü– Schmi; B0006: Schmi–Wie; B0007: Wie–Zwie; the documents for the letter A are missing in the federal archives.

²⁷ BArch R 3001/21177.

²⁸ The barely analyzed *Warnkartei*, which has only been researched in two studies according to specific interests (namely the systemization of the *HJ*'s own practices of sanctioning: K. Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, Göttingen, Vandenhoeck & Ruprecht, 2007; trans.: *Order and exclusion. Disciplinary politics in the Hitler-Jugend*; and the systemization of social inequality within the *HJ*: Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit.), and its included 4779 individual cases, were reviewed fully for this purpose. Due to the reasons for exclusion it contained, it represents a rich source for the causes of social inequality on the basis of attributed personality traits, as well as the sanctioning resulting from these.

²⁹ Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., p. 163.

³⁰ BArch R 3001/21177.

contained 4779 exclusions. The here explained practice of exclusion reached its peak in the alleged quiet years of the dictatorship, from 1934 to 1939. During the war there were only few cases, the last disciplinary exclusion was recorded on April 5th, 1945. The analysis of the *Warnkartei* with respect to the detectable establishments of inequality showed that the given reasons for exclusion can be distributed in clusters in three bigger categories of stigmatizing attributions typical for the NS time:

1. offenses against morality, 2. attitude/ appropriate behavior, 3. race. The first group of offenses with respect to sexuality and morality represents about one third of the cases and is, therefore, the biggest, although there are gender specific distinctions. Only about 6% of the exclusions based on the reasons given in the first category affected BDM members. When a girl or a young woman was excluded on the basis of aspects of this group, it was usually due to §218 (abortion³¹). With respect to the male *HJ* members, the accusation of homosexuality, and especially the respective seduction of subordinates through *HJ* leaders, accounted for about two thirds, and thus one fifth of all exclusions, thereby representing the biggest group of that category. Other offenses against morality were only rarely and in serious cases (such as the attempted rape of a BDM-leader) sanctioned with exclusion. In the *Warnkarten* of this first category the prevailing reasons for exclusions were §174 («sexual offenses and the abuse of dependence and subordinate relation»), §175 («fornication between men»), and §176 (paragraph 3, «sexual offenses against children»). More often, the individuals were excluded due to offenses against §174 and §175³² rather than because of an offense to §176. However, combinations of several offenses can also be found³³. Other reasons, such as «incest» only appear seldom. This shows that apart from the fact that the youth organization showed special activity in prosecuting male homosexuality³⁴ amongst its members, the attribute mentioned in §175 also represents a gathering point. This gathering point also subsumed other activities such as «bündische Umtriebe» (machinations within the organization) in order to legally justify sanctioning³⁵. However, the reasons for exclusion in this category also clarify the vagueness of the NS' – and among them the *HJ* sanctioned – punishable offenses³⁶. Hence, the *Kartei*

³¹ BArch NS W B0001.

³² BArch NS W B0001-4 and 7.

³³ BArch NS W B0002.

³⁴ BArch NS W B0002.

³⁵ BArch NS W B0002 and 5.

³⁶ For an analysis of the intended vagueness of the Nazi ideology and its propagandistic statements with the aim of increasing a motivation for inclusion among the recipients, who could allegedly consider their own needs to be picked up on within the organization, cf. Benecke, *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftlicher und politischer Bedingungen sowie deren biographischer Bedeutung*, cit., pp. 221-240.

includes more information which is not verified further, such as «sexual orientation»³⁷, «moral corruption» or «moral misconducts», as well as «masturbation»³⁸ which represented a reason for disciplining in order to suppress the adolescents' exploration behavior. The sanctioning handling of offenses with respect to §175 represents an illustrative example for the functional view on formation education of the subjects affected. Thus, the denunciation by *HJ* leaders to the responsible authority for persecution within the *HJ* jurisdiction was not only a form of desirable counteractions. It rather represents a clearly communicated duty to forward the charges in such cases³⁹. How clearly an inequality generating functional standardization became priority over an actual comradeship in the sense of friendly solidarity becomes obvious when considering an example of a sentence issued by the *HJ*'s High Court. The example also shows how the *Reichsjugendführung* functionally interpreted and sanctioned attested deviations from the code of comradeship, which was a behavioral maxim expected and demanded from all members of the *BDM* and the *HJ*⁴⁰.

The 33-year-old *Bannführer* (leader of a unit) A. had received information that a member of his staff, *Hauptgefolgschaftsf.* B., was involved in homosexual misconducts. A. did not forward this information, but only pointed out to B. to refrain from such actions. The *Reichsbefehl (Reichs command) 4/I* from January 31st, 1936 contains the following order: The *HJ* leaders are obliged to give immediate notice through official channels whenever they come to know of a member's offense against 175, even if it is only a smaller offense. Not giving notice will immediately lead to punishment of the respective leader. As A. stated himself, he was aware of the order's content, but deliberately counteracted it. He justified his action by stating that he had a comradeship relationship to B..A. was highly undisciplined. [...] A. is, therefore, intolerable as leader. [...] It is only due to his – until now – good services and the length of his membership to the movement prior to the assumption of power that led the *HJ* High Court to abstain from greater disciplinary sanctions. A. has been deprived of the ability to act as youth leader⁴¹.

The second category of the above mentioned listing included (assigned gender specifically): offenses of delinquency (especially thievery⁴², and embezzlement)⁴³, offenses against the discipline (as a general description⁴⁴,

³⁷ BArch NS W B0001.

³⁸ BArch NS W B0002.

³⁹ «Der HJ-Richter», Februar 1942, p. 7 (BArch NS 28/82); transl.: *The HJ judge*, February 1942.

⁴⁰ Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 68-71.

⁴¹ *Der HJ-Richter*, Februar 1942, pp. 7-8 (BArch NS 28/82).

⁴² BArch NS W B0001 to 4.

⁴³ BArch NS W B0001, 2 and 4.

⁴⁴ BArch NS W B0002.

as insubordination⁴⁵, with respect to the practice of authority («disastrous treasury management»⁴⁶) and unauthorized assumption of authority («forgery of documents», «unauthorized wearing of insignias»⁴⁷), as well as the political or the inappropriate national socialist attitude and the respective allegation of behavior harmful to the organization (as a general description⁴⁸, with respect to one's own appearance («denigrating the *HJ* uniform»⁴⁹, «lack of interest»⁵⁰, «sabotaging work»⁵¹), but also due to defamation of superior *Führerinnen* and *Führer*, as well as higher-ranked representatives of the NS regime⁵², among them also the *Reichsjugendführer*⁵³). Finally, there are numerous references to a membership or the inappropriate handling of excluded *HJ* members with alleged politically («Bündische»⁵⁴) and racially («contact to Jews»⁵⁵) deviating population groups. In this escalating category of reasons that mixed political and moral valuations, we can find vague, arbitrarily interpretable information, such as «behavior harmful to the *HJ*» or «attitude not in line with *HJ*»⁵⁶, as well as simply «misconduct»⁵⁷.

The third category justified exclusions according to the principles of inclusion considering hereditary biology and race («great form of hereditary mental illness»⁵⁸, «mental inferiority»⁵⁹) or the continuous shift of boundaries throughout the NS time (cf. the later coming explanation of gray areas in inclusion). One can, therefore, often find retroactive exclusions. In these cases, the already approved admission would later be repealed due to attested «Nichtarierchaft» (not being Aryan) or «Nichtarischer Abstammung» (non-Aryan descent) (as a general description⁶⁰ as well as in: «belonged to the Jewish religious community», «Jewish Mischling (hybrid)»). These reasons for exclusions were often contradictory to the racial regulations for inclusion within the *HJ*. For example when, without further justification- the status of «Mischling» of first or second degree⁶¹ was given – an attribution that would have only been sufficient for a referral to «provision». A similar case

⁴⁵ BArch NS W B0003, 4 and 7.

⁴⁶ BArch NS W B0001 and 3.

⁴⁷ BArch NS W B0002 and 4.

⁴⁸ BArch NS W B0002.

⁴⁹ BArch NS W B0002.

⁵⁰ BArch NS W B0001 to 3.

⁵¹ BArch NS W B0002 and 4.

⁵² BArch NS W B0001 to 3.

⁵³ BArch NS W B0007.

⁵⁴ BArch NS W B0002 and 5.

⁵⁵ BArch NS W B0002 and 3.

⁵⁶ BArch NS W B0001 to 7.

⁵⁷ BArch NS W B0005.

⁵⁸ BArch NS W B0004.

⁵⁹ BArch NS W B0007.

⁶⁰ BArch NS W B0001, 2, 4 and 7.

⁶¹ BArch NS W B0002, 5 and 7.

applied when the only reason for exclusion was due to the status of being a «Fürsorgezögling»⁶² (an adolescent being given into someone else's care) – the transferal into corrective training represented a possibly but not necessarily excluding aspect, which would have had to be verified further⁶³. In general it can be found that the *Warnkartei* portrays a depressively impressive source of the regime related production of social inequalities under the involvement of the *HJ*. In it the practice of an attempt at stabilizing existing power structures with the help of attributions and resulting sanctions manifests thousand-fold. Reasons for exclusions that would especially be interesting in an educational-historical perspective, such as violence towards subordinates, can only be found in a per mil range. Such reasons for exclusions would only occur in cases of massive and particularly in consistent repetitive uses of violence (the «continuous abuse» or the «mean and rough treatment» of inferior *HJ* members, especially the younger ones («Pimpfe»)). These findings, however, also appear to show that a targeted socially differentiating «education for hardship» within the youth organization was not only tolerated to a certain level, but even intended. Although flogging was officially forbidden, it needed an overstepping of a rather high barrier of hardship in order for it to be sanctioned. This is even more true for the highest, here analyzed process of disciplining within inclusion, namely the final exclusion from the *HJ*. A *BDM*- or *HJ* leader had to be guilty of massive overstepping on these levels in order to become no longer viable for the youth organization and, therefore, to appear as no longer «useful». If exclusions were in fact justified in this manner, the statement would usually only refer to general offenses («assault and battery») and never included a questioning of the person's educational action. This category of attributions thus represents the disciplinary counterpart to the moral offenses, due to which the organization – with great commitment – sought «homosexual» misconducts among male *HJ* leaders in particular.

b) *Race (dimension) or racism (determinant)*

When it comes to races, contemporary research and biological findings show that they are «social constructs»⁶⁴. The form of racism, which in consequence is older than the races it puts down, is about the «social construct of natural inequality»⁶⁵. The NS-regime considered power to be the condition and basis

⁶² BArch NS W B0002.

⁶³ W. Tetzlaff, *Das Disziplinarrecht der Hitler-Jugend. Entwicklung, gegenwärtiger Stand, Ausgestaltung*, Berlin, Deutscher Rechtsverlag, 1944, pp. 43-44; transl.: *The disciplinary rights of the Hitler-Jugend. Developments, current status, configurations*.

⁶⁴ W. Hund, *Rassismus*, Bielefeld, Transcript, 2007, p. 120; transl.: *Racism*.

⁶⁵ Id., *Rassismus. Die soziale Konstruktion natürlicher Ungleichheit*, Münster, Westfälisches Dampfboot, 1999; transl.: *Racism. The social construct of natural inequality*.

Laufende Nr.	1807	DA Obz. 4-23/39
Name	[REDACTED] WARNUNGSKARTE erstellt.	
Bersname	Leni	
geb. am	27.1.1919	
in	Bad Salzschlirf	
Ort. Wohnort	B [REDACTED]	
Strasse	Haus Stöhr	
Religion		
Letzter Beruf	Bademädchen	
frühere Mitglied-Nr.	[REDACTED]	
ausgeföhl. am	21.2.39	
Grund	§ 218	
Letztes Gebiet	14 Kurhessen	
Letztes Übergau	24. April 1939	
RL-Kartei nicht gemeldet		

Pic. 1. Exemplary extract from the Warnkartei category I, BArch NS W B0001.

Laufende Nr.	211
Name	E [REDACTED]
Bersname	Siegfried
geb. am	6.3.15
in	
Ort. Wohnort	O [REDACTED]
Strasse	Danziger- [REDACTED]
Religion	kath.
Letzter Beruf	Schüler
frühere Mitglied-Nr.	876098
ausgeföhl. am	6.8.34
Grund	bündische Betätigung
Letzter Ober-Bann	47 nicht gemeldet
Letzter Gau	6. Gau 1935
RL-Kartei nicht gemeldet	

Pic. 2. Exemplary extract from the Warnkartei category I, BArch NS W B0002.

Laufende Nr.	4403	Akte P 2: 01340
Name	[REDACTED] WARNUNGSKARTE erstellt.	
Bersname	Massud	
geb. am	20.3.1923	
in	Teheran/Iran	
Ort. Wohnort	E [REDACTED]	
Strasse	Fressburger Str. [REDACTED]	
Religion		
Letzter Beruf		
frühere Mitglied-Nr.	[REDACTED]	
ausgeföhl. am	11.10.37	
Grund	Nichtarier	
Letztes Gebiet	17 Thüringen	
Letztes Übergau		
RL-Kartei nicht gemeldet 12.6.11.37		

Pic. 3. Exemplary extract from the Warnkartei category I, BArch NS W B0002.

for an enablement to establish ideologically and politically motivated social inequality, and saw its reign in its institutionalized form as the socio-cultural precondition for the implementation of population policy; racism represented the ideologically and propagandistically spread legitimation. In this context, its argumentative use had a stabilizing effect on the regime's power:

Racial demarcation [...] provides all members of society with ideologically sanctioned, often equipped with religious or scientific legitimacy, ways of discrimination applicable regardless of social differences [...]. It, therefore, allows demarcation, revaluation, and protest all in one and – at the same time – stabilizes the relations that are themselves the motivator for the application. [...] In any case, it denies the humanity of those affected and, therefore, legitimizes the exploitation and persecution equally⁶⁶.

If understood according to this definition, it can be stated that racism as Nazi characteristic represented the central reference point of the NS ideology and – without a doubt – «was the crux of the matter when it comes to politics of inequality implemented by the NS-regime after 1933»⁶⁷. In the context analyzed here, a functional definition of racism needs to be pursued. According to Christian Geulen, racism can be understood «as an attempt to theoretically justify and practically produce traditional or new boundaries of affiliation in times of uncertainty with respect to belonging»⁶⁸. Geulen points out that the boundaries of affiliation are theoretically justified by referring to the alleged nature of a community's in- or exclusion of the respective group of persons⁶⁹, while the practical establishment of a respective differentiation is usually implemented violently. For the Nazi regime this meant that «the aim for 'racial purity' [...] was reflected in its unprecedented racist policy»⁷⁰. On the one hand, it was supposed to eradicate all influences foreign to the racial norms, and on the other hand valued its members' worth only according to their use for the community led by the Nazis. Accordingly, the regime specified the hierarchies and increasingly acted – during the war in an increased radicalization – in compliance with the specifications on a sociopolitical level⁷¹. In this process,

⁶⁶ *Ibid.*, p. 126.

⁶⁷ Kramer, Nolzen, *Einleitung*, (transl.: *Introduction*), cit., p. 16.

⁶⁸ Ch. Geulen, *Geschichte des Rassismus*, München, C. H. Beck, 2007, p. 11; transl.: *History of racism*.

⁶⁹ With respect to the functional application of the aspect of «nature» as a legitimizing work-around for the Nazi ideology, as well as its propagandistic spread, and the legitimation of the implementation in the exercise of power see in more detail: Benecke, *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftlicher und politischer Bedingungen sowie deren biographischer Bedeutung*, cit., pp. 250-271.

⁷⁰ J. Echterkamp, *Im Kampf an der inneren und äußeren Front. Grundzüge der deutschen Gesellschaft im Zweiten Weltkrieg*, in Id. (edd.), *Das Deutsche Reich und der Zweite Weltkrieg. Bd. 9. Die deutsche Kriegsgesellschaft 1939 bis 1945*, München, Deutsche Verlags-Anstalt, 2004, pp. 1-94 (quot. on p. 6.); transl.: *The battle at the domestic and the outer front. Main features of German society in WW II*.

⁷¹ Benecke, *Sozialisation während der NS-Zeit. Eine systematisierende Analyse gesellschaftli-*

however, the NS «movement», for whose existence activity and dynamics were preconditions, was systematically presented with the contradictions of its development laws. This showed that Nazi's race ideology and the deriving population policy, with all its stigmatization, as well as quantitatively and qualitatively exposed persecution of individual groups «foreign to the racial norm», was not led by selective categories. Rather it referred to one big gray area in which the above mentioned, violent social differentiation represented a permanent formal principle of the Nazi regime. It finally became obvious

that 'racial purity' and 'hereditary health' are dynamic concepts which – in the sense of self-regulation of the evolutionary process – can continuously be narrowed so that an increasing number of social classes fell under the verdict. Discrimination would thus begin at the margins of society and would eat into the center – with increasing aggression at the same time⁷².

Without wanting to relativize any of the particular fates of individuals, it is quite important to see that – from a viewpoint of socialization theory – such a process of exclusion would not only affect those «of alien ethnicity», «criminals», «hereditary inferior», and «social misfits», all of which could be determined in clearly distinguished groups and isolated from the «national community». Rather, this kind of exclusion could affect any «national comrade» if a function holder of the NS system attributed any of the mentioned characteristics to them. In the context of the NS exclusion practice this happened with great arbitrariness and to an increasingly widening extent.

The characteristic of racism as the main paradigm of the NS ideology also had great effects on the regime's youth policy. The attempts of practically implementing the intention to «burn»⁷³ the «sense for race» in general and especially the particular form of radical anti-Semitism into the upcoming «Aryan» generation can be found in different severities and in concretely applied methods within all areas of the NS education⁷⁴. In accordance to said objective, the «issue of the so-called race-political education belonged to the fixed inventory of the ideological training work of the HJ»⁷⁵ since the beginning

cher und politischer Bedingungen sowie deren biographischer Bedeutung, cit., pp. 323-338.

⁷² H.-W. Schmuhl, *Rassenhygiene, Nationalsozialismus, Euthanasie: Von der Verhütung zur Vernichtung «lebensunwerten Lebens»*. 1890-1945, Göttingen, Vandenhoeck & Ruprecht, 1993, p. 189; transl.: *Racial hygiene, National Socialism, euthanasia. From contraception to destruction of lives «unworthy to live»*.

⁷³ A. Hitler, *Mein Kampf*, München, Verlag Franz Eher Nachfolger, 1933, pp. 475-476.

⁷⁴ See with respect to the agenda: H. Stellrecht, *Die Wehrerziehung der deutschen Jugend*, Berlin, E. S. Mittler & Sohn, 1938, pp. 29, 53; transl.: *The military education of German youth; with respect to the implementation*; Benecke, *Sozialisation während der NS-Zeit*, cit., pp. 208-220, 272-322; with respect to the HJ: Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., pp. 72-82.

⁷⁵ *Ibid.*, p. 70. With respect to the meticulous regulations of the «ideological training» of the HJ cf. VHB. HJ, Bd. II, 1942, S. 1999-2010.

of 1934. In June 1939 the *Reichsjugend's* press service announced that the «racial thought», especially in its anti-Jewish characteristic, had become the «focus of all ideological educational work within the *Hitler-Jugend*», and praised this development as an outstanding achievement within the figuration of education.⁷⁶ Thus, on the level of a *HJ* specific conveyance of ideology, the racial ideology and the encouragement to behave in a respective racial-aware manner represented one of the key elements in the *HJ* training for both sexes, although the intensity of conveyance was lower within the BDM⁷⁷.

The *HJ* as a youth organization had its own definition for a target group, which would – on the other hand – refer back to the basic value of «race» or «blood»⁷⁸. Since the mid-thirties, the so-called «Aryan certificate» was required for admission or in order to assume leadership in the *HJ*. Ever since the summer of 1936, and thus before the implementation of the *HJ* law, members had to prove «that in their families there had not been any colored or Jewish ancestors before January 1st, 1800» with the help of a great «certificate of descent»⁷⁹. On the level of the organizational structure it was those population categories that – according to the legal definition of the anti-Semitic law of 1935 – were «fully Jewish», as well as those whose membership would have presented an all too obvious contradiction to the propagated racist doctrine due to phenotypic characteristics, both of which were supposed to be excluded from the *HJ* service on principle. This was experienced especially by adolescents across both sexes who were distinct from the «Aryan» ideal because of their dark skin tone⁸⁰. Affected by this in particular were, among others, those adolescents who according to the inclusion related extensions of the implementing provision of 1939 and the here determined inclusion of colored German citizens would have been liable for compulsory service⁸¹. The terminological vagueness («looks», «characteristics» etc.) which opened the flood gates to a socially differentiating arbitrariness with which exceptions from the rule were planned, allowed those affected to experience highly burdensome inequality⁸².

⁷⁶ *Ibid.*, p. 70.

⁷⁷ Schulungsplan der *HJ* 1934, pp. 3-6; transl.: *Training schedule of the HJ*.

⁷⁸ H.-H. Dietze, *Die Rechtsgestalt der Hitler-Jugend. Eine verfassungsrechtliche Studie*, Berlin, Deutscher Rechtsverlag, 1939, pp. 74-75; transl.: *The legal form of the Hitler-Jugend. A constitutional study*.

⁷⁹ K. Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, Göttingen, Vandenhoeck & Ruprecht, 2007, p. 96; general information to the «Aryan certificate» as formal condition for a *HJ* management career cf. VHB. *HJ*, Bd. II, 1942, pp. 796-799.

⁸⁰ *Ibid.*, pp. 201-202; J. Tent, *Im Schatten des Holocausts. Schicksale deutsch-jüdischer «Mischlinge»*, Köln, Böhlau, 2007, pp. 93-98; transl.: *In the Holocaust's shadow. Fates of German-Jewish Mischlinge*.

⁸¹ Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., p. 201.

⁸² Cf. for example with regard to the *HJ*: H. Massaquoi, «Neger, Neger, Schornsteinfeger!» *Meine Kindheit in Deutschland*, Bern, Buch und Medien, 1999, pp. 107-112; transl.: «Neger, Neger, Schornsteinfeger!» *My childhood in Germany*; with regard to the BDM: M. Nejahr, *Mach nicht so traurige Augen weil du ein Negerlein bist. Meine Jugend im Dritten Reich*, Reinbek bei

4. *The gray areas of the race-related differentiating inclusion structure of the HJ*

The interplay of the introduced dimensions of power and racism in the *HJ* related origin of social inequality is now to be clarified exemplary with the help of the obvious contradiction which would result from the lacking selectivity of the organization's own group definition.

With respect to the public, which was controlled by the Nazi's propaganda and behavioral regulations, this could further lead to a balancing act on a narrow and rarely straight path. This eventually meant a maximum of social inequality, the exercise of rule on the one hand, and powerlessness to a great extent on the other hand.

The representatives of the regime, here the *Reichsjugendführung* and the *HJ* leadership on the lower levels, led the affected adolescents onto a by the regime determined path of functionality of reign using profound arbitrary power with respect to the interpretation of racial ideological maxims. At the same time, those affected by assumed deviations would be threatened with unmitigated exclusion, which in the «culling» dynamic of National Socialism would almost always entail cumulative, additional repression. The fact that some affected adolescents would willingly accept the submitted offers with respect to inclusion, and maybe even internalize the accompanying, sometimes emotionally relieving attributions, is understandable firstly because they would otherwise be faced with a constantly threatening living environment, and, secondly, because it did not change anything regarding the above mentioned realization of complete powerlessness. They basically depended on the NS-functionaries' certificates. At the most, they could experience their own degrees of freedom if they avoided inclusion in advance, and thereby unofficially chose and initiated exclusion – at the expense of a further accelerated social isolation and oftentimes the

Hamburg, rororo, 2007, pp. 82-87; transl.: *Don't look so sad because you're a negro. My youth in the third Reich*. In the light of the rigid exclusion practice on the basis of phenotypical patterns of attribution within the youth organization, the few detectable depictions of colored adolescents in *HJ* uniforms (cf. Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., p. 142) can be attributed to two specific social categories: First of all, there were those adolescents who created a phantasy uniform, often coming from an oppressive experience of isolation; secondly, the brief accouterment with *HJ* uniforms of foreign guests' children (VHB. *HJ*, Bd. III, 1942, S. 2340-2344). With a special «permission of the international office of the RJF» that had to be granted individually, foreigners «of foreign ethnicity and without a *Reichs*-German citizenship [...] could grant their children a part of the *Hitler-Jugend's* educational training» (VHB. *HJ*, Bd. II, 1942, p. 192). Regular membership of colored children and adolescents in the *Hitler-Jugend* are unknown. This finding is especially true for the second and third stage of the Nazi reign, where the above intended, racially legitimated, retroactive exclusions took place, whereas before there could have been individual cases in consequence of collective transfer of entire associations of youth organizations into the *HJ*. See Tent, *Im Schatten des Holocausts. Schicksale deutsch-jüdischer «Mischlinge»*, cit., p. 94.

endangerment of oneself⁸³. The contradiction would become especially obvious whenever the attributions of a racist category and the phenotypical appearance of the adolescents did not match, thereby triggering a heterogeneous impulse of in- and exclusion especially in relation to the *HJ*. As has been indicated above, in these cases it was usually the phenotypical appearance that decided on whether an adolescent was considered useful and thus invited to a functional inclusion or whether they were defamed as «of foreign ethnicity» or simply «foreign» and therefore excluded. Such experiences could equally be made by adolescents of dark skin⁸⁴ or Jewish «Mischlinge»⁸⁵ depending on the attributions to the respective propagated racial stereotypes of the NS ideology and propaganda.

Eventually, the two framing influences (power, racism) created a heterogeneous, but at the same time highly effective mental and policy-making complex web of causality of social inequality. In the following, this will be clarified exemplary by taking a closer look at the procedural structures in the context of the *HJ*'s racially-selective practice of inclusion, and by systemizing group-specifically, which has not been done with respect to the research perspective concerning the creation of social inequality. These show the caused gray areas between the claim for ideological selection and the totalitarian claim, which in this context did not occur on accident, but rather evolved as a direct result of the dependency of the *HJ*'s inclusion policy and the requirements of the previously outlined determinants. In a stage specific and systemized manner, adolescents were – at least temporarily – targeted to serve in the *HJ* or were at least tolerated, who were supposed to have been excluded according to the general Nazi ideology and its collectively attributing propagandistic proclamations. Such gray areas of inclusion relevant to inequality within the *HJ* can be found, to different extents according to the stage they appeared in, in three areas⁸⁶. Due to the constraints of this paper, only two can be named. The fate of the Jewish «Mischlinge» is then to be used in order to exemplary portray the importance of gray areas with respect to their relation to inequality, by taking a closer look at their development.

The first gray area of inclusion in the *HJ* can be found within the NS occupational policy in the East of Europe, especially in Poland. Here, the BDM and the *HJ* both were, although equipped with gender-specific tasks⁸⁷,

⁸³ *Ibid.*, pp. 62-63.

⁸⁴ *Ibid.*, pp. 93-94.

⁸⁵ *Ibid.*, pp. 59-65; Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 144-147.

⁸⁶ *Id.*, *Die Hitler-Jugend 1933 bis 1945. Programmik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 60-68; ; *Id.*, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 151-171.

⁸⁷ Cf. with regard to the *HJ* and their involvement in the politics of the «Germanization» of an occupied Poland, as well as the care of «ethnic Germans» in the integrated areas and the «Reichsgau Wartheland»: Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., pp. 804-825; regarding the BDM: E. Harvey, «Der Osten braucht

actively and systematically involved in creating social inequality⁸⁸, which was euphemistically obfuscated as «racial and educational politics»⁸⁹. This participation especially took place in terms of organizational or care responsibilities in the context of a «repatriation of *Reichsdeutsche* or ethnic Germans abroad»⁹⁰, as well as in the urged development of *HJ* organization structures in the incorporated territories⁹¹, which Heinrich Himmler's leadership aimed at starting in 1939. Those adolescents affected by the racially selective implemented «Germanization», which was, furthermore, a legitimization of the political regime, found themselves in a gray area of desired inclusion and violent exclusion only on the basis of characteristics attributed to them with no fault of their own. Their fate represents a continuous desiderate within research – especially in the German speaking countries⁹².

The second gray area of the *HJ* inclusion affected those who, according to «biological» criteria, were part of the socially differentiated part of the «national community» that were negatively connoted. Its emergence and development shows the inequality causing interplay of dynamically evolving racism on the one hand, and the intention of comprehensive control of power on the other hand. The here subsumed, racially legitimized social differentiations that were bound to the reign, especially affected those members of the «national community» who were attested a disability and were thus not in accordance with the *HJ* membership's propagated ideals of the «hereditary healthy»⁹³. This, accordingly, led to the founding of some «Sonderbanne», consisting of those who were socially differentiated due to «biological» patterns of attribution in the first stage of the NS reign and the connected organization development⁹⁴.

dich.» Frauen und nationalsozialistische Germanisierungspolitik, Hamburg, Hamburger Edition, 2009, pp. 110-115, 250-260 and 319-322; transl.: «*The East needs you.*» *Women and national socialist Germanization policies*.

⁸⁸ H.-Ch. Harten, *De-Kulturation und Germanisierung. Die nationalsozialistische Rassen- und Erziehungspolitik in Polen 1939-1945*, Frankfurt am Main, Campus, 1996, pp. 99-110, 265-27; transl.: *De-culturation and Germanization. The National Socialists' racial and educational policies in Poland 1939-1945*; Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., pp. 814-825; J.-D. Steinert, *Deportation und Zwangsarbeit. Polnische und sowjetische Kinder im nationalsozialistischen Deutschland und im besetzten Osteuropa 1939-1945*, Essen, Klartext, 2013, pp. 97-10; transl.: *Deportation and forced labor. Polish and Soviet children in a National Socialist Germany and in the occupied Eastern Europe*.

⁸⁹ *Ibid.*, pp. 69-73.

⁹⁰ Cited from Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., p. 804.

⁹¹ BArch NS 28/36, Bl. 23-26.

⁹² I. Hopfer, *Geraubte Identität. Die gewaltsame «Eindeutschung» von polnischen Kindern in der NS-Zeit*, Köln, Böhlau, 2010, p. 12; transl.: *Stolen identity. The forceful «Germanization» of Polish children in the Nazi-era*.

⁹³ Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 62-63; Id., *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 168-171.

⁹⁴ VHB. HJ, Bd. II, 1942, pp. 55, 60-61.

In March 1934 the *Reichsjugendführung* approved Bann B (for the blind), in December of 1934 Bann G (for the deaf), and in July of 1935 Bann K (for the physically handicapped)⁹⁵. After only a few months of its emergence, Bann K was dispersed in 1936/37 because its existence and especially a possible public perception of the physically handicapped presented an obvious, possibly phenotypically recognizable contradiction to the racial ideology⁹⁶.

Finally, as mentioned above, there was a third gray area in the context of *HJ* inclusion with respect to the members of the alleged main category of the excluded racist NS population policy. Here, the *Reichsjugendführung* transformed the NS population policy's patterns of inequality based on racism directly into the organizational structures of the *HJ*. The here allegedly appearing, continuous contradiction can only be understood when taking the stage structure of the Nazi reign into consideration. While the inclusion of entire groups of associations of youth organizations could lead to the admission of adolescents of «foreign ethnicity» in the first stage, there had not been any binding admission criteria that would have principally excluded these adolescents at that point. Many decisions had to be made by the responsible *HJ* functionaries on the spot, who often wanted to prove the efficiency with respect to the radical «cleansing» of their divisions. At the same time, however, the *Reichsjugendführung* established its totalitarian claim little by little. Thus, it was possible that the paradoxical situation of adolescents first being excluded from the *HJ* and later being liable for compulsory service could arise. Additionally, the combination of a consideration for pragmatic reasons with regard to the Nazi-reign and the totalitarian claim of the *Reichsjugendführung* within the first, second, and the early part of the third stage led to the inclusion of those of «foreign ethnicity» persisting, while at the same time other representatives of the same population group were rejected crudely or even defamed and physically attacked. A central criterion concerning this matter was the protection of the ideological appearance of an existing racial purity among *HJ* members. It was in the second half of the last stage at the latest that almost all of the adolescents of «foreign

⁹⁵ M. Büttner, *Nicht minderwertig, sondern mindersinnig...*, *Der Bann G für Gehöreschädigte in der Hitler-Jugend*, Frankfurt am Main, Peter Lang, 2005, pp. 79-84; transl.: *Not inferior but less ingenious...*, *Bann G for the deaf in the Hitler-Jugend*.

⁹⁶ VHB, *HJ*, Bd. II, 1942, p. 60; W. Brill, *Pädagogik der Abgrenzung, Die Implementierung der Rassenhygiene im Nationalsozialismus durch die Sonderpädagogik*, Bad Heilbrunn, Klinkhardt, 2011, p. 175; transl.: *Pedagogy of demarcation. The implementation of racial hygiene in National Socialism through Special Needs Education*. Relevant research has barely given the early dispersion of Bann K any attention (see Brill, *Pädagogik der Abgrenzung, Die Implementierung der Rassenhygiene im Nationalsozialismus durch die Sonderpädagogik*, cit., p. 175). Indications that support the above mentioned thesis can be found in a note from a meeting 11.11.1936 led by the responsible *Reichsjugend's* organization leader Heyl. Here, the dispersion of Bann K was decided on and justified by stating that «fundamentally physically handicapped are not conducive for the appearance of the *HJ* structure due to their outer appearance» (BArch NS 12/1357). Desiderates in research can be found with respect to all of the *Sonderbanne*, Brill, *Pädagogik der Abgrenzung, Die Implementierung der Rassenhygiene im Nationalsozialismus durch die Sonderpädagogik*, cit., p. 158.

ethnicities «were excluded from the Nazi organization and treated» accordingly to NS racial policies. However, there were undiscovered or randomly tolerated exceptions until last, especially within the *Wehrmacht* (armed forces).

The here affected main groups of «foreign ethnicity» included: the population group of Sinti and Roma derogatorily graded as «Gypsy», on the one, and the Jewish «Mischlinge» on the other hand. In accordance with the common parlance of the National Socialists, Sinti and Roma were socially degraded by calling them «Gypsies». They were, furthermore, recorded and «treated» as such. Within the Nazi regime catchment area their group had to endure a similar prosecution of that of the Jewish population⁹⁷. This notably characterized the life experience of their younger and youngest adolescents⁹⁸. At the same time, however, they too would find themselves in contradictory admission regulations of the *HJ* when they reached a certain age. In the thirties, some *HJ* memberships of «Gypsies» and «Gypsy Mischlinge» were recorded⁹⁹. Most exclusion in this population group, too, appeared starting in the early thirties if the affected had not already reached the age of eighteen beforehand anyways. According to this selective subdivision with regard to allegedly existing differentiability in hybrid levels, the *Reichsjugendführung* determined in May 1942,

that gypsies and gypsy Mischlinge are not to be liable for compulsory service. Exceptions are those gypsy Mischlinge with mainly German bloodlines whose parents were considered to be socially adapted by the Berlin *Reichskriminalamt* [comparable to a criminal department] [...] ¹⁰⁰.

This transfers at least four characteristics of the racist NS population policy into the (planned) admission practice of the *HJ*: a differentiation according to alleged «German» parts of that population group for which there was to be a liability for compulsory service (1); a further reaching differentiation according to the attested level of «socially adapted» behavior of the marked adolescents (2); the highly marginal opportunity of the affected themselves to influence their classification (3); the decisive exclusion of all members of the population group who cannot be attributed with the above mentioned admission criteria (4).

⁹⁷ M. Zimmermann, *Rassenutopie und Genozid. Die nationalsozialistische «Lösung der Zigeunerfrage»*, Hamburg, Wallstein, 1996; transl.: *Racial utopia and genocide. The National Socialist «solution to the gypsy issue»*; C. Fings, F. Sparing, *Rassismus – Lager – Völkermord. Die nationalsozialistische Zigeunerverfolgung in Köln*, Köln, Emons, 2005; transl.: *Racism – Camp – Genocide. The National Socialist persecution of Gypsies in Cologne*.

⁹⁸ C. Fings, R. Sparing, «*Tunlichst als erziehungsfähig hinzustellen*». *Zigeunerkinder und –Jugendliche: Aus der Fürsorge in die Vernichtung*, «Dachauer Hefte», vol. 9, n. 9, 1993, pp. 159-180; transl.: «*Presenting as capable of education at all costs*» *Gypsy children and adolescents: from care to extermination*. The research of the Sinti and Roma adolescents' fate in general back then, as well as with respect to the *HJ* represent an educational-historical desiderate.

⁹⁹ Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 149-151.

¹⁰⁰ BAArch R 43-II/522b, Bl. 95; printed in Benecke, *Die Hitler-Jugend*, cit., p. 297.

The Jewish adolescents' fate is now to portray the *HJ* differentiations' structure, which they were affected by and which are structurally comparable to those mentioned above. The race-related provisions of the NS-system were especially directed against Jews («Non-Aryans»), within the *HJ* against Jewish children and adolescents between the ages of ten and 18. However, some adolescents among them could experience a temporary admission to the *HJ* if they were classified to be part of the legal gray area of the Jewish «Mischlinge»¹⁰¹, or a subdivision of that «race» category¹⁰². A transfer of the youth association in which they were previously organized into the *HJ* would also result a *HJ* membership¹⁰³. In some individual cases they had already joined the *HJ* before 1933¹⁰⁴.

The «Mischlinge» faced a great arbitrariness from their surroundings and especially the National Socialist organizations because of their racially constructed and justified social status¹⁰⁵. Thus, it was quite likely that appearance alone or more precise the existence of allegedly «Jewish» physical features decided upon whether an adolescent was considered a «Jew» and, therefore, excluded from the *HJ*¹⁰⁶. Now and then sons of the same family

¹⁰¹ The first decree of the Reich Citizen Act, a part of the so-called «Nuremberg laws», enacted September 15, 1935, ruled on November 14, 1935: «A person of 'mixed Jewish blood' was, whoever 1. descends from two Jewish grandparents (half Jew), but a) does not belong to the Jewish religion (anymore) on Sept. 15, and did not join the religion at a later point in time and b) is not (or not anymore) married to a Jew on Sept. 15 and would not enter matrimony with a Jew at any later point in time (such half Jews were called 'Mischlinge of the first degree'); and 2. descend from a Jewish grandparent ('Mischling of the second degree' [the so-called 'quarter Jew', J.B.]). See R. Hilberg, *Die Vernichtung der europäischen Juden*, Frankfurt am Main, Fischer, 1999, p. 76; transl.: *The extermination of the European Jews*. In 1939, this classification affected approximately 64000 «Mischlinge of the first» and 43000 «Mischlinge of the second degree» in the German Reich. W. Benz, *Überleben im Untergrund* [transl.: *Surviving in the underground*, in Id. (ed.), *Die Juden in Deutschland 1933-1945. Leben unter nationalsozialistischer Herrschaft*, München, C.H. Beck, 1996, pp. 660-700 (quot. on p. 687); transl.: *Jews in Germany 1933-1945. Living under national socialist reign.*] 90% of them belonged to a Christian confession.

¹⁰² N. Stoltzfus, *Widerstand des Herzens. Der Aufstand der Berliner Frauen in der Rosenstrasse – 1943*, München, dtv, 2003, pp. 93-94, 171-172; transl.: *A heart's resistance. The Berlin women's resistance in Rosenstraße*; Tent, *Im Schatten des Holocausts. Schicksale deutsch-jüdischer «Mischlinge»*, cit., p. 78.

¹⁰³ B. Meyer, «Jüdische Mischlinge» *Rassenpolitik und Verfolgungserfahrung 1933-1945*, Hamburg, Dölling and Galitz, 1999, pp. 282-287; transl.: «Jewish Mischlinge.», *Race politics and the experience of prosecution*; Tent, *Im Schatten des Holocausts. Schicksale deutsch-jüdischer «Mischlinge»*, cit., pp. 93-98. The burdened course of socialization of Jewish Mischlinge during the Nazi-reign has also not been researched in a proper extent Meyer, «Jüdische Mischlinge» *Rassenpolitik und Verfolgungserfahrung 1933-1945*, cit., pp. 9 and 12.

¹⁰⁴ *Ibid.*, p. 171.

¹⁰⁵ Benz (ed.), *Die Juden in Deutschland 1933-1945. Leben unter nationalsozialistischer Herrschaft*, cit., pp. 684-690.

¹⁰⁶ Cf. exemplary: H. Rosenbaum, «Und trotzdem war's ne schöne Zeit.» *Kinderalltag im Nationalsozialismus*, Frankfurt am Main, Campus, 2014, p. 178. transl.: *It was good times though. «Children's everyday life during National Socialism».*

Casefile Nr.	3978	Akte P 2: 00564
Name	P. [redacted] WARNUNGSKARTE	
Vorname	Hans Georg	
geb. am	11.2.1918	
in	Hannover	
Regist. Wohnort	Hannover [redacted]	
Straße	G. [redacted]	
Religion	ev.	
Regist. Beruf		
Frühere Mitglied-Nr.	117 568	
ausgetrl. am	August 33	
Grund	Der Vater war Jude	
Rechtes Gebiet	8 Niederrhein	
Regist. Obergau	13.7.31 18 [signature]	

Pic. 4. Exemplary extract from the Warnkartei category III, BArch NS W B0006.

Casefile Nr.	1458	
Name	S. [redacted] WARNUNGSKARTE erstellt.	
Vorname	Lina	
geb. am	22.4.1924	
in	Frankfurt/Main	
Regist. Wohnort	Frankfurt/Main	
Straße	P. [redacted]	
Religion	kath.	
Regist. Beruf		
Frühere Mitglied-Nr.	1 904 148	
ausgetrl. am	Ausgeschieden Jan. 38	
Grund	Nichtarische Abkunft (Halbjude)	
Rechtes Gebiet	13 Hessen-Nassau	
Regist. Obergau	nicht gemeldet	

Pic. 5. Exemplary extract from the Warnkartei category III, BArch NS W B0007.

made different experiences when it came to their classification¹⁰⁷. «Mischlinge» of both degrees were admitted into the general *HJ* until 1940^{108, 109}. In contrast, the *HJ* had excluded 574 members of «partially Jewish descent» between 1933 and 1939 according to the records of the organization's *Warnkartei*¹¹⁰.

¹⁰⁷ Tent, *Im Schatten des Holocausts. Schicksale deutsch-jüdischer «Mischlinge»*, cit., pp. 49-54 and pp. 61-62.

¹⁰⁸ Meyer, «Jüdische Mischlinge» *Rassenpolitik und Verfolgungserfahrung 1933-1945*, cit., p. 195.

¹⁰⁹ Cf. exemplary the auto-biographic report of Helmut Schmidt, whose grandfather was a Jew. H. Schmidt, *Kindheit und Jugend unter Hitler*, Berlin, Siedler, 1992, p. 209; transl.: *Childhood and youth under Hitler*. He was a member of the *HJ*, later even of the marine-*HJ*'s special brigade (*ibid.* pp. 226-229), did not consider himself Jewish (*ibid.*, pp. 217-220) and was only referred to the respective social differentiations through the youth organization without being affected by them himself: «It was in the Hitler-Jugend that I heard of the Nazi concept of race for the first time» (*ibid.*, p. 223). With relation to the *HJ*, Helmut Schmidt's example clarifies that the assumption that Germans and Jews were selectively differentiable and distinguished population groups at the time of the Nazi's assumption of power, was misleading, especially regarding assimilated Judaism.

¹¹⁰ K. Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, Göttingen, Vandenhoeck & Ruprecht, 2007, p. 98.

In «‘their total claim for inclusion’ the *Reichsjugendführung* finally applied the adolescents’ official duty with a bureaucratic craze of comprehensiveness»¹¹¹ to the members of the here mentioned groups of «foreigners». This was especially true for the time after the enactment of both, the implementing provisions of 1939 and the corresponding radicalization of the adolescents’ disciplining, which included the totalitarian claim for inclusion, and the inclusion-related contradictions produced by them¹¹². According to this expansion¹¹³ the *Reichsjugendführung* ordered a new admission practice for the *HJ* in October 1941¹¹⁴.

Within these race-related regulations for admission – and thus the organization’s own regulation of the socially differentiating criterion of «admission» – the inequality generating characteristics, which had already been presented for «Gypsies» above, come into effect. The same was true for the preference of «deutschblütige» adolescents (of German blood), which has to be highlighted and interpreted as a social differentiation in the sense of the earlier defined differences in admission, when it came to enabling them to «attend to their adolescent duty». In this context, the known mistrust, also based on assumed attributions of racist complexion, towards an alleged attempt of conspiracy of the «Jewish race» also broke free. For example, when it was said: «Provision [and thus not a complete admission into the *HJ* service; J.B.] of Jewish “Mischlinge” alone [hence in groups without an organization related and thus power-related control; J.B.] has to stop». Eventually, however, it was the greatly, socially differentiating care that Jewish «Mischlinge of the first degree» became liable for compulsory service in the *HJ* between March 1939 and October 1941 contrary to the earlier, at least propagated «general exclusion»¹¹⁵. Afterwards, they were only to be made available; an assignment for service, however, was not to be given anymore. Hybrids of the first degree, who were already members of the *HJ*, were to be «eliminated»

¹¹¹ Buddrus, *Totale Erziehung für den totalen Krieg. Hitlerjugend und nationalsozialistische Jugendpolitik*, cit., p. 284.

¹¹² Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., pp. 201-205 and p. 303.

¹¹³ «The expansion of the target-group – then including outwardly and behaviorally compliant ‘Mischlinge’ – made use of the gradual differentiation with respect to the relation of descent of the 1935 enacted ‘Reich Citizen law’ and was justified with the legal construction of the government’s official duty»; *Ibid.*, p. 201. In an effort of obtaining the presentable and inclusion promotional residuals of a «racial purity» within the *HJ*, all «Mischlinge» were excluded from the «Stamm-*HJ*» VHB. *HJ*, Bd. II, 1942, S. 195. This subdivision applied tougher racist measurements as obstacles for admission than the Nuremberg laws on the one, and the respective criteria of the norm-*HJ* on the other hand, specified – another social inequality within inequality.

¹¹⁴ BArch R 43-II/512, Bl. 246; printed in Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmatik, Alltag, Erinnerungen. Eine Dokumentation*, cit., pp. 283-284.

¹¹⁵ Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., pp. 96 and 202.

Jüdische Mischlinge und Jugendliche nichtdeutscher Volkszugehörigkeit 2 IG

Es ist künftig zwischen Mischlingen 1. und 2. Grades zu unterscheiden. Mischlinge 1. Grades sind solche, die von zwei der Rasse nach volljüdischem Großelternanteil abstammen ($1/2$ -Juden). Mischlinge 2. Grades sind solche, die von einem der Rasse nach volljüdischen Großelternanteil abstammen ($1/4$ -Juden).

Auf die Erläuterungen des Begriffs im einzelnen im Rundschreiben des Stabsführers vom 2. 4. 1940 Nr. 33/40 wird Bezug genommen.

1. Mischlinge 2. Grades

Mischlinge 2. und niedrigeren Grades sind wie deutschblütige Jugendliche zum Dienst heranzuziehen.

a) Erfassung der 10jährigen.

Die Jugendlichen erhalten einen Zuweisungsschein und sind den zuständigen Einheiten zu überweisen.

b) Erfassung der älteren Jahrgänge (1924 bis 1929).

Mit Rücksicht auf die durch den Krieg bedingte Führerlage und die besonderen Kriegsaufgaben kann im allgemeinen von den älteren Jahrgängen bei ihrem Aufruf jeweils nur ein Teil zum Dienst herangezogen werden, während der Rest bereitzustellen ist.

In erster Linie sind hierbei die jüdischen Mischlinge bereitzustellen, um zunächst den deutschblütigen Jugendlichen die Möglichkeit zu geben, ihre Jugenddienstpflicht abzuleisten.

Können bei der Führerbesetzung der Einheit alle Jugendlichen des aufgerufenen Jahrganges zum Dienst herangezogen werden oder soll nach Anweisung der gesamte Jahrgang zum Dienst herangezogen werden, so sind Mischlinge 2. Grades wie deutschblütige Jugendliche durch Aushändigung eines Zuweisungsscheines zum Dienst heranzuziehen. Eine Bereitstellung der jüdischen Mischlinge allein hat zu unterbleiben.

2. Mischlinge 1. Grades

a) Erfassung und Aufnahme.

Mischlinge 1. Grades sind ausnahmslos bereitzustellen, und zwar auch dann, wenn eine Bereitstellung deutschblütiger Jugendlicher nicht erfolgt. Eine Zuweisung zum Dienst erfolgt demnach künftig nicht mehr.

b) Mischlinge 1. Grades, die der Hitler-Jugend bereits angehören.

Nachdem der Führer und Reichskanzler die Entlassung aller jüdischen Mischlinge 1. Grades aus der Wehrmacht angeordnet hat, sind nunmehr sämtliche Mischlinge 1. Grades, die bereits der Hitler-Jugend angehören, durch Erteilung eines Bereitstellungsscheines wieder aus der Hitler-Jugend zu entfernen.

c) Bereitgestellte Mischlinge 1. Grades sind zu keinerlei Dienstleistung heranzuziehen.

d) Der Grund für die Bereitstellung der Mischlinge 1. Grades auch in den Fällen zu Ziffer 2 b ist bei etwaigen Anfragen und Beschwerden dahin zu beantworten, daß mit Rücksicht auf die Einberufung neuer Geburtsjahrgänge und den kriegsbedingten Führermangel nicht mehr alle Jugendlichen zum Dienst herangezogen werden können und auch zahlreiche deutschblütige Jugendliche keine Möglichkeit zur Ableistung ihrer Jugenddienstpflicht haben. Ein Hinweis auf die politischen Hintergründe der Bereitstellung ist in jedem Falle zu vermeiden. Geben sich Beschwerdeführer mit diesem Bescheid nicht zufrieden, so sind sie an das Hauptamt I der Reichsjugendführung zu verweisen. Dorthin sind auch weitere Beschwerden mit Vorgängen zu leiten.

Die Einheitsführer sind entsprechend zu unterrichten.

Der Erlaß gilt nur im Bereich des Jugenddienstrechts. In die Stamm-HJ können jüdische Mischlinge nicht aufgenommen werden.

Der Erlaß darf Außenstehenden nicht zur Kenntnis gebracht werden.

from their ranks by «issuing a ticket for provision»¹¹⁶. On October 18.1941 the *Reichsjugendführer* Axmann, on the other hand, affirmed that theoretically there was a duty for service for Jewish «Mischlinge of the second degree», as well. They were to be continued to be drafted for *HJ* service pro forma¹¹⁷, but in fact would in most cases only be in «provision». This was due to the inequality intensifying order that in the face of a lack of *HJ* leaders in the war «German blooded adolescents were to be given the opportunity to fulfill their duty for youth service first»¹¹⁸. This, as shown, did not apply to «Mischlinge of the first degree» anymore. In fact, the latter were to be removed from the *HJ* silently at the latest with the beginnings of the systematic deportations in 1941. Therefore, Jewish «Mischlinge of second or lower degree» were still liable for compulsory youth service in 1943, but were not allowed to become members of the *Stamm-HJ* which – according to the first implementation order of the *HJ* law from March 1939 – admitted every adolescent who – among others – had voluntarily joined the youth organization before a compulsory service for adolescents was implemented¹¹⁹. The latter was also a secondarily social inequality generating measure aiming at «protecting the access' function to the associations of parties»¹²⁰. For this purpose, one referred back «to the strict definition of Jews made by the party»¹²¹. Since 1942, however, those Jewish «Mischlinge» that were not actually exempted from duty according to the law, were ultimately excluded from *HJ* service without ever publicly communicating it¹²². The latter procedure presented a third social differentiation which was founded on racist reasons and implemented in dependence on power: after the separation of the Jewish population (1), and the differentiation according to «Mischlinge degree» (2), there was then a refusal of access for partial groups of those originally liable for compulsory service (3) without them being able to make an impact. As a consequence of the here outlined attributions which could in no way be influenced by those affected, the affected «Mischlinge» faced a tangible «inner conflict»¹²³ between a partial inclusion, which they were

¹¹⁶ BArch R 43-II/512.

¹¹⁷ Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., p. 202.

¹¹⁸ BArch R 43-II/512.

¹¹⁹ Reichsgesetzblatt (RGBl.) I, Nr. 66, 6.4.1939, pp. 709-710.

¹²⁰ Kollmeier, *Ordnung und Ausgrenzung. Die Disziplinarpolitik der Hitler-Jugend*, cit., p. 202.

¹²¹ VHB. HJ, Bd. II, 1942, p. 195; printed in Benecke, *Die Hitler-Jugend 1933 bis 1945. Programmik, Alltag, Erinnerungen. Eine Dokumentation*, cit., p. 179.

¹²² BArch NSD 43/111.

¹²³ S. Grabowsky, «*Meine Identität ist Zerrissenheit.*» «Halbjüdinnen» und «Halbjuden» im Nationalsozialismus, Gießen, Psychosozial, 2012; transl.: «*My identity is inner conflict.*» «Halb-Jews» in NS times. «Inner conflict» is understood, here, in the sense of a social ambivalence, which represented a substantial characteristic of adolescent Jewish «Mischlinge»'s identity back then. Ibid., pp. 93-112. In this context it can be defined as follows: «Social a., feature of a social situation, in which a holder of one or more positions is faced with incompatible, normative expectations, and the person does not have a solution for the conflict» [W. Fuchs-Heinritz, R. Lautmann, O. Rammstedt, H. Wienold, *Lexikon der Soziologie*, Opladen, Westdeutscher Verlag, 1994, p. 34].

threatened to lose rather than experience any reevaluation from it, and a partial, stigmatizing exclusion in accordance with the anti-Semitic NS policy. As a result, some members of said race category experienced burdensome inequality with relation to the *HJ* even after 1945. From then on, they were apparently required to justify their *HJ* membership retrospectively, while they were sometimes classified as «followers» due to the same denazification committees¹²⁴.

Conclusion

As mentioned earlier, the general perception of the *HJ* is oftentimes based on contemporary colported combination of two, complementing perspectives, which are often remembered to the present day: on the one hand there is the propagandistic enactment of the *HJ* as a restrictive organization that included all of the German or «ethnic German» adolescents who were classified as «racially pure»¹²⁵; on the other hand, there is the gradually tightening, and monitored and sanctioned obligation for all adolescents to become members of the *HJ*, which finally led to the logical consequence of hitherto unimagined rates with regard to the nominal collection data. Together they created a sustainably effective image, which conventionalized an adapted belonging of the addressees as the alleged socially and legally inevitable norm starting in 1936 and at the latest by 1939. In contrast, the preceding executions clarified exemplary that – similar to developments of other areas of the «national community»¹²⁶ – the existence of a heterogeneously caused and structured variety of occurring inequality specific for the organization was more characteristic for the *HJ*, than a homogenization of its target group occurring because of their own impact. A conflict situation of at least four aspects became causally effective: First, an NS specific frame built on the dimensions of power and race or rather the interplay between the two. Secondly, the immediately resulting determinants of reign and racism, the latter as a racist practice of action and justified race ideology; all of which were applied to the level of social practice. Thirdly, the relation patterns between

Understood in the here presented ways, this state means social inequality, as access to the definition of categories of affiliations is denied to those affected, and thus greatly compromises the degrees of freedom of a self-determined identity formation.

¹²⁴ Meyer, «*Jüdische Mischlinge*» *Rassenpolitik und Verfolgungserfahrung 1933-1945*, cit., p. 256.

¹²⁵ B. v. Schirach, *Die Hitlerjugend. Idee und Gestalt*, Berlin, Koehler und Amelang, 1934, pp. 66-72; transl.: *Idea and configuration of the Hitler-Jugend*.

¹²⁶ F. Bajohr, M. Wildt, *Volksgemeinschaft. Neue Forschungen zur Gesellschaft des Nationalsozialismus*, Frankfurt am Main, Fischer, 2009; transl.: *National community. New research regarding the society of the National Socialism*; D.v. Reeken, M. Thießen, «*Volksgemeinschaft*» als soziale Praxis? *Perspetiven und Potentiale neuer Forschungen vor Ort*, Paderborn, Schönigh, 2013; transl.: «*National community*» as social practice? *Perspectives and potentials of new research on the spot*.

these two influencing variables and other, oftentimes traditional and the Nazi reign outlasting, social differentiation criteria (sex, area/region, environment etc.). Fourthly, some other patterns of social differentiations, crossing the ones already mentioned, such as age of the affected or the point of time of their membership that could – in the interaction with requirements for admission and task – generate *HJ* specific experiences of inequality¹²⁷. Finally, it becomes clear that a simple, dichotomous differentiation cannot comprehend the *HJ* specific occurrences of social inequality on all levels of the NS-reign's execution in its complexity of causes and features sufficiently. This requires consistently differentiated and analyzing object perspectives. As a result, it, therefore, appears appropriate not to assume a successful enforced conformity of the German youth through the *HJ*. Rather, an order of organization specific social inequality which was provoked and strengthened by their activities, racially defined and entrenched the considered target group with social claims of control, can be interpreted as their central feature. In this context, it is to be classified as dynamic in a particular manner, as shown, for two reasons: Firstly, due to the dependence on the stage in which it came to their manifestations. Secondly, considering the causing interplay between the framing dimensions or rather the relation between them and other patterns of differentiation.

¹²⁷ This also refers to the phenomenon of intersectionality as an intersecting of various social categories, which can not only cause an increase of the experience of social inequality in the particular case at hand, but could, furthermore, result in an exacerbated exclusion and persecution of those affected. Cf. with regard to the *HJ*: Benecke, *Soziale Ungleichheit und Hitler-Jugend. Zur Systematisierung sozialer Differenz in der nationalsozialistischen Jugendorganisation*, cit., pp. 95-96.

Francoist censorship and its influence on magazines and comics for female children and teenagers (1938-1977)

José Joaquín Rodríguez Moreno
University of Washington – University
of Cádiz
Seattle (United States of America) –
Cádiz (Spain)
tebeoteca@uca.es

ABSTRACT: General Franco's dictatorship imposed publications for children and teenagers a strict censorship system, which generated an important limitation for authors and editors of comic books. This article analyses – through the legislation of the «Boletín Oficial» del Estado and theoretical texts published during the dictatorship- who were the people in charge of creating the regulations and supervising the contents, and what objective they were looking after in the case of female teen comics, which were publications aimed at female readers. We will also examine the different positions on this gender-based segregation, discovering the dissenting voices that appeared and the arguments they employed.

EET/TEE KEYWORDS: History of education; Journals; Comics for female children; Spain; XXth Century.

Introduction

General Francisco Franco's regime (1939-1975) meant a turning point for Spanish history, breaking the liberal tradition that prevailed up to that moment and imposing the concepts of authority and hierarchy in their most extreme ways. A very clear example is presented in the case of women: they will witness how a new social framework will be created through legislation, institutions of the State and the control of culture; one which grants a predominant role to men, reserving a secondary and subordinated role for women, as a mere

«shadow of man»¹. To justify this subordination to the male, Catholicism and the imposition of a system of beliefs and values that seeks the restoration of «tradition and the old ways»² were used; this even come to acquire a nature that Román Gubern does not hesitate to call «fundamentalist»³. This discourse is reinforced with a biologicist discourse which aspires to the withdrawal of women from public life and, through allegedly scientific arguments, seeks to persuade people to believe in the «disastrous consequences» of work away from home for women, a situation which -according to this- would create «weak and sneaky» children⁴.

These values and beliefs are introduced through education, which in the case of women will take place on three different but supplementary levels. The first level is primary and secondary education, under control by the Church⁵, which originates a school segregated by sex, the existence of subjects known as «Home Education» and mandatory tests on domestic subjects for young women aspiring to gain admission to higher education⁶. The next one is the Sección Femenina, the female branch of the single-party that existed during Francoism, which forces Spanish young women to undertake a six-month long social service with half that time dedicated to theoretical formation and the other half to community service in eating houses, hospitals and offices (if this service is not carried out, women lose the opportunity to get an academic degree or a passport or driving license; it was also an essential requirement for working as a civil servant)⁷. Finally, indoctrination of the population is reinforced by mass media, with a fierce control by the state both directly (through direct management of radio stations, television, newspapers, etc.) and indirectly (through censorship, public funding, etc.)⁸.

The fact that the press (newspapers, magazines, comic books, pamphlets, etc.) is used from the beginning to indoctrinate the people is not shocking, since the first legislation about press made by the dictatorship makes clear that written

¹ P. Domínguez Prats, M.C. García-Nieto París, *Franquismo: Represión y letargo de la conciencia feminista, 1939-1977*, in B.S. Anderson, J.P. Zinsser (edd.), *Historia de las mujeres. Una historia propia*, 2 vols., Barcelona, Crítica, 1991, vol. 2, pp. 640-648 (quot. on p. 641).

² J. Sánchez Jiménez, *La jerarquía eclesiástica y el Estado franquista: las prestaciones mutuas*, «Ayer», n. 33, 1999, pp. 167-186 (quot. on p. 169).

³ R. Gubern, *La censura. Función política y ordenamiento jurídico bajo el franquismo (1936-1975)*, Barcelona, Península, 1981, pp. 21-22.

⁴ M.T. Vera Balanza, *Maternología y discurso natalista en la radio de postguerra. Málaga. 1940*, in M. D. Ramos Palomo (ed.), *Femenino plural. Palabra y memoria de mujeres*, Málaga, Universidad de Málaga, 1994, pp. 203-219 (quot. on p. 217).

⁵ S. Juliá, *La sociedad*, in J.P. Fusi, J.L. García Delgado, S. Juliá et al. (edd.), *Franquismo: El juicio de la historia*, Madrid, Temas de Hoy, 2005, pp. 69-143.

⁶ P. Folguera Crespo, *El Franquismo. El retorno a la esfera privada (1939-1975)*, in E. Garrido (ed.), *Historia de las Mujeres en España*, Madrid, Síntesis, 1997, pp. 527-548.

⁷ Crespo, *El Franquismo. El retorno a la esfera privada (1939-1975)*, cit.

⁸ J.P. Fusi, *La cultura*, in Fusi, García Delgado, Juliá et al. (edd.), *Franquismo: El juicio de la historia*, cit., pp. 219-296.

media is «a decisive organ in the formation of popular culture and, above all, in the creation of collective conscience»⁹. And among press we can find not only publications for adults, but also magazines for children and teenagers (also known as *tebeos* or comic books, even though their contents were more than that, adding texts, articles, surveys, mail sections, etc.), a major mean of entertainment during most of Francoism¹⁰. For that reason, dictatorship advocates will appear soon and will want to use this mean of entertainment as a backdoor of sorts, one that permits getting in touch with new generations, as Justo Pérez de Urbel, director of the teen fascist publication *Flechas y Pelayos* admits. He sees magazines for children and teenagers as a «supplement for the school, which must also have formation as a main goal: religious, moral, patriotic, scientific and human formation»¹¹.

The main tool the State will count on for controlling this indoctrination through magazines for children and teenagers is censorship, which has been studied in comic book magazines for males and for both male and female readers¹², but has barely been examined in the case of publications aimed at females. However, the fact that a gender based segregation for magazines existed indicates that the ones aimed at little and teenage girls will have particular characteristics. Our objective in the following pages will be coming to understand how censorship affected them, who created those rules and in which way they were construed, verifying if there was consensus or there was not.

1. Methodology

The present research starts from the premise that the discourses of cultural works are never innocent nor the result of chance. The ones with the power to shape cultural works, in this particular case through a censorship system, can show representations of society according to their own interests and ideology, e.g., offering a single model for women and negating any other alternative; this way, representation becomes a political issue¹³. And the thing is, although

⁹ Órgano decisivo en la formación de la cultura popular y, sobre todo, en la creación de la conciencia colectiva, *Ley de prensa*, «Boletín Oficial del Estado», 24 April 1938.

¹⁰ A. Martín, *Apuntes para una Historia de los Tebeos*, Barcelona, Glénat, 2000.

¹¹ «Complemento de la escuela [que] debe también tener como finalidad primaria la formación [...]: religiosa, moral, patriótica, científica y humana», J. Pérez de Urbel, *Las revistas infantiles y su poder educador*, «Revista nacional de educación» n. 1, 1941, pp. 55-58 (quot. on p. 56).

¹² For example, in I. Fernández Sarasola, *La legislación sobre historieta en España*, Sevilla, AcyT Ediciones, 2014 y V. Sanchís, *Tebeos mutilados: La censura franquista contra Editorial Bruguera*, Barcelona, Ediciones B, 2010.

¹³ M. Marshment, *The Picture is Political: Representation of Women in Contemporary Popular Culture*, in V. Robinson, D. Richardson (edd.), *Introducing Women's Studies*, Londres, MacMillan Press, 1997, pp. 125-151.

an article or a comic book cannot create a model for women by itself, they can reinforce and normalize the discourses transmitted by other media (school, public spaces, family, etc.), given that they helped limit and direct the expectations of young girls.

That is why, when studying censorship, I think that is necessary to differentiate three different elements that are connected to each other. First, the people who develop the regulation and supervise its observance; second, the regulations themselves which limit publishing houses; and finally, the debates these regulations generate. This way, through the knowledge of these elements, it is possible to better understand the discourses and persuasion capacity that the dictatorship articulated through censorship of the children and teen publications aimed at female readers.

To carry out this analysis I will first turn to the existing legislation, both Press laws and the particular regulation on children and teen publications; with this it is possible to know who were the people in charge of controlling publications and what kind of limitations were imposed to publishing houses. Then, I carry out an analysis of the specialized literature on the subject written at the time, in order to make it possible to verify if there was unanimity among experts on the way of focusing these publications or if, on the contrary, there was dissension. Finally, I will use various interviews with authors and editors to supplement the voids that laws and theoretical texts from the time cannot fill with their experiences.

2. The People in Charge of Creating and Applying Censorship Rules

Censorship of children and teen publications during Francoist Spain has three periods. The first (1938-1951) can be considered a phase of general censorship, one without a specific legislative corpus and with use of the same censorship rules for every print media regardless of age and gender of readers. The second (1952-1962) already shows a series of specific rules and creates an experts committee to advise the authorities, although it presents problems in its implementation. The third (1962-1977) creates an effective model of censorship of children and teenage press.

The legislation on press created in 1938 during the Civil War, known simply as Ley de Prensa, establishes an extensive control through previous censorship on every publication, regardless of age or sex of the intended readers¹⁴. Falange Española Tradicionalista (FET) will be in charge of monitoring the contents between 1941 and 1946, a period in which the regime's single-party will be

¹⁴ «Boletín Oficial del Estado», 24 April 1938.

responsible for controlling the press¹⁵. Afterwards, it was transferred to civil servants called «lectores» (readers), under the vigilance of the Dirección General de Prensa. Finally, from 1964 to 1977, children and teen press will have «lectores» who are specialised on the subject, paid by the Dirección General de Prensa, although without being civil servants¹⁶. In any case, both if they are civil servants and if they are members of the Party, it is obvious that these people are close to the regime and care about the indoctrination in its values¹⁷.

It is possible that the regime does not see at first the necessity of paying special attention to children and teen publications because, right after the end of the war, the publishing houses specialised in this audience are only a few. As a matter of fact, during most of the forties the main publications for minors are edited by the regime itself¹⁸ and are directed by people akin to it who are convinced of the formative role of children and teen press: *Flechas y Pelayos* is under the responsibility of the previously mentioned friar Justo Pérez de Urbel, religious advisor of Sección Femenina and future abbot of the monastery of Valle de los Caídos (a monument dedicated to the fallen of the winning side of the Civil War and, up to this day, tomb of the dictator); as for *Chicos* and *Mis Chicas*, they are directed by Consuelo Gil Roësset, an active collaborator of Francoist press during the Civil War. That is why the necessity for control of contents by the State does not appear until the late forties, when companies that publish *tebeos* with a more commercial than indoctrinating criteria begin to gain traction against publications of the regime, giving more importance to entertainment¹⁹.

The first steps in controlling the contents of teen publications, regardless of who publishes them, are taken by the Ministerio de Información y Turismo, ministry in charge of -among other issues- media, which in 1952 creates an expert panel to advise the State in matters regarding that kind of publications, explicitly acknowledging that this sort of reading «can greatly influence in their formation [children and teen readers]»²⁰. This panel is named Junta Asesora de la Prensa Infantil, and the profiles of its eight members make clear that its objective is to recover the indoctrinating tone of publications from the previous decade, since among its members we find children magazines directors like friar Justo Pérez de Urbel and Consuelo Gil Roësset; people associated with FET press like Juan Antonio de Laiglesia González, Antonio Casas Fortuny and Félix Valencia y Pérez de Ayala; a FET member, Elisa de Lara Osío; the

¹⁵ Sarasola, *La legislación sobre historieta en España*, cit.

¹⁶ A. Martín Martínez interviewed by the author via email, 21-25 July 2017.

¹⁷ Sarasola, *La legislación sobre historieta en España*, cit.

¹⁸ M. Barrero, *Nueva mirada sobre la producción editorial de tebeos durante los años cuarenta*, «Espacio, tiempo y forma. Serie V», n. 26, 2014, pp. 89-113.

¹⁹ Martín, *Apuntes para una Historia de los Tebeos*, cit.

²⁰ «Puede influir de modo considerable en su formación», *Orden de 21 de enero de 1952 por la que se crea la Junta Asesora de la Prensa Infantil*, «Boletín Oficial del Estado», 1 February 1952.

president of catholic association Asociación de las Jóvenes de Acción Católica, Carmen Enríquez de Salamanca Díez; and the secretary of the group of parents Confederación Nacional de Padres de Familia, José María Hueso Ballester²¹. As it can be observed, profiles akin to Catholicism and FET prevail.

The first specific «guiding regulation» for children and teen publication comes from this Junta Asesora in 1955, which works as a guideline for the public servants who carry out the previous censorship. Besides, this group has the mission to issue reports about the aptitude of new publications that ask for permission to go on the market, guarantee compliance with the regulation and even propose changes in contents to the Ministerio, which insures double control: publishing houses not only have to deal with censorship inspectors, but also with the recommendations being made by the Junta Asesora²². Having said that, in practice neither the control system nor the regulation were thoroughly applied, «due to the absence of official structure and organigram and also to the fact that [...] lack of specific people in charge of explicitly apply the articles of the dictated Orders»²³. Therefore, in practice, censorship to children and teen publications follows the same pattern than the rest of publications.

This system starts changing in 1962, when Manuel Fraga Iribarne is appointed as director of the Ministerio de Información y Turismo. A few months after his arrival, the Junta Asesora changes its name to Comisión de Información y Publicaciones Infantiles y Juveniles²⁴. The main change at this point is the consolidation of power by the Catholic sector in it; of twenty-two members, it is established that representation must be as follows: two from Comisión Episcopal de Prensa e Información, two from Gabinete Santa Teresa de Acción Católica, two from Asociación Católica Nacional de Padres de Familia and two from Comisión Católica Española de la Infancia²⁵. This amount of Catholics contrasts with, for example, the number of members from FET, which is a total of six, two of them coming from Sección Femenina, an organization that has more Catholic than fascist elements since the last days of the Civil War²⁶. To this already great influence one has to add members with strong ultra-

²¹ *Orden de 5 de febrero 1952 por la que se crea la Junta Asesora de la Prensa Infantil*, «Boletín Oficial del Estado», 21 February 1952.

²² *Orden de 24 de junio de 1955, por la que se desarrolla el Decreto sobre ordenación de las publicaciones infantiles y juveniles*, «Boletín Oficial del Estado», 2 February 1956.

²³ Martín Martínez interviewed by the author, cit.

²⁴ *Decreto 2551/1962 de 27 de septiembre, por el que se reorganiza la Dirección General de Prensa*, «Boletín Oficial del Estado», 12 October 1962.

²⁵ *Orden de 13 de octubre de 1962 por la que se regula la composición y funcionamiento del Consejo Nacional de Prensa*, «Boletín Oficial del Estado», 23 October 1962 and *Orden de 31 de octubre de 1962 por la que se amplía la composición de la Comisión de Información y Publicaciones Infantiles y Juveniles del Consejo Nacional de Prensa*, «Boletín Oficial del Estado», 7 November 1962.

²⁶ D.B. Genevois, *Mujeres de España: de la república al franquismo*, in G. Duby, M. Perrot (edd.), *Historia de las mujeres: El siglo XX*, 5 vols., Madrid, Taurus Ediciones, 1993, vol. 5, pp. 203-222.

Catholic convictions which you can find among the six board members and the discretionary appointment secretary who is elected directly by the Ministerio de Información y Turismo, e.g., the two priests elected in the 1966 renovation²⁷. The control of Catholic sectors will go on until the constitution of the last Comisión in 1976²⁸.

But the most important part will be that from 1964 this Comisión will be in charge of appointing and coordinating the people who will act as «readers» of children and teen publications. This will be the starting point of a specific censorship, fiercer than the one experimented during the previous years²⁹. This control does not subside with the approval of a new Ley de Prensa in March of 1966, which ends previous censorship for adults, but specifies the creation of a special regulation for children and teen publications. When this new regulation appears ten months later, it keeps the obligation of going through a previous revision from the censorship institution, the Dirección General de Prensa, before going on the market³⁰. Supervision of publications will go on until the appearance of the first democratic reforms in 1977, with the dictator already dead, which will bring freedom of the press and, therefore, the end of censorship³¹.

3. *The Censorial Regulation and Its Objective with Female Children and Teen Publications*

The censorial regulations in Francoist Spain not only have the objective of banning certain subjects, they also seek to reflect the values of the dictatorship³². Among those we can find the ones related to the ideal of femininity, which represent women as people distant from reason, tied by emotions, feelings and religiousness³³. In this way, they are conceived as an essential supplement to men: if men have the intelligence that lets them participate in public space, women

²⁷ Orden de 4 de mayo de 1966 por la que se dispone la renovación de los miembros de la Comisión de Información y Publicaciones Infantiles y Juveniles, integrada en el Consejo Nacional de Prensa, «Boletín Oficial del Estado», 24 May 1966.

²⁸ Orden de 31 de mayo de 1976 por la que se dispone la renovación de la Comisión de Información y Publicaciones Infantiles y Juveniles integrada en el Consejo Nacional de Prensa, «Boletín Oficial del Estado», 23 July 1976.

²⁹ A. Martín Martínez interviewed by the author.

³⁰ Decreto 195/1967, de 19 de enero, por el que se aprueba el Estatuto de Publicaciones Infantiles y Juveniles, «Boletín Oficial del Estado», 13 February 1967.

³¹ Real Decreto Ley 24/1977, de 1 de abril, sobre libertad de expresión, «Boletín Oficial del Estado», 12 April 1977.

³² Fernández Sarasola, *La legislación sobre historieta en España*, cit.

³³ I. Blasco Herranz, *Más poderoso que el amor: Género, familia, piedad y política en el movimiento católico español*, «Pasado y Memoria. Revista de Historia Contemporánea», n. 7, 2008, pp. 79-100.

were born carry out their role as mothers and wives in the household³⁴, a role that they can perform perfectly thanks to their emotional abilities and caretaker skills³⁵. Both the dictatorship and the Church will cling to this discourse even during the sixties and early seventies, when the inclusion of women to the paid work force becomes normal: these roles will become acceptable because they work subordinate to men, and it will be expected from them that their working day does not affect their family duties in the least³⁶.

Since values in which to indoctrinate female young people are not the same that the ones for male young people, publications will be segregated by gender. Actually, law does not require publications for teens to be divided by gender until 1955 (children publications were for boys, girls or both)³⁷, but in practice it is required that the target audience be identified in some way, so that some of the most popular headings indicate who are the intended readers: «Mis chicas» (started in 1941) not only makes clear its intended audience with its name («My Girls»), but also with the cover announcement that the publication goes on the market «with ecclesiastical censorship for older girls»; «Florita» (1949) and «Lupita» (1950) both note at their title that they are magazines «for girls»; «Ardillitas» (1950) indicated that it contained «comics for girls», and «Mariló» (1950) defines itself as an «ideal publication for girls». Other collections do not seemingly indicate gender, but their titles refer to female proper names, which doubtless guides the buyer: «Azucena» (1946), «Margarita» (1951). The only publication that does not have an obvious clue as to who it is aimed at is «Gran Hotel» (1947), although its covers clearly show that it contains romantic stories, having a very similar vibe to female adult magazines. We must understand the fact that publications were segregated as an attempt to send concrete messages to each gender: what was going to be explained to female readers was not intended for male readers, and *vice versa*.

The first legal framework for censorship we can find, the Ley de Prensa of 1938³⁸, does not differentiate between publications for children, teens and adults, and neither it explains what can what cannot be written, resulting in a law so vague that, in practice, allows complete freedom to the censor criteria to decide what is and what is not admissible. More than a mistake or a void, Professor of Constitutional Law Fernández Sarasola sees this ambiguity as a

³⁴ A. Morcillo Gómez, *En cuerpo y alma. Ser mujer en tiempos de Franco*, Madrid, Siglo XXI, 2015.

³⁵ C. Valencia Fernández, *Las políticas para las mujeres trabajadoras durante el franquismo*, in G. Niefra Cristóbal (ed.), *Mujeres y hombres en la España franquista: Sociedad, economía, política, cultura*, Madrid, Editorial Complutense, 2003, pp. 145-178.

³⁶ M.C. García-Nieto París, *Modelo de mujer que creó el franquismo y los colectivos de mujeres que generó*, in G. Duby, M. Perrot (edd.), *Historia de las mujeres: El siglo XX*, 5 vols., Madrid, Taurus Ediciones, 1993, vol. 5, pp. 640-668 (663).

³⁷ *Orden de 24 de junio de 1955, por la que se desarrolla el Decreto sobre ordenación de las publicaciones infantiles y juveniles*, cit.

³⁸ «Boletín Oficial del Estado» (24 April 1938).

strategy from the State to force publishing houses to engage in self-censorship, since they do not know the limitations for sure³⁹. Moreover, Francoism does not trust so much a rigid code of regulations for publications (which can always present voids and omissions) as it does a selection of people ideologically related to publish them; that is why in order to be in charge of a magazine, the Ley de Prensa requires the appointment to be backed up by the State, something Consuelo Gil Roësset (later a member of the Junta Asesora de la Prensa Infantil) considers essential when publishing any magazine aimed at minors: «The content of the publication is the least important thing; what has to be reviewed is the content of the publisher: his/her scrupulousness, knowledge of childhood, motivations for aiming at a child reader»⁴⁰.

This system of selecting people close works well for the reduced editorial output minors are offered in the forties, but by the end of the decade the number of publishing houses and publications without direct ties to the State increases⁴¹; the regulator decree of 1945 itself acknowledges that its appearance is due to the «growth of published aimed at children and teens in recent years»⁴². Therefore, the State faces new circumstances which «demand a legal order which guarantees the straight religious, moral political and cultural orientation of these publications»;⁴³ the fact that religious and moral orientation is named before political and of course before cultural orientation is in itself a statement of intent. Even though the regulations had to be equally respected in children and teenager publications, both male and female, some of them had particular impact in stories for girls, since these emphasized romance and family⁴⁴; thus, we can find the prohibition of referring to «illegitimate love», matrimonial infidelity, divorce, scenes which could «unhealthily arouse» or awaken «unhealthy curiosity on the physiology of the generation», showing love without idealization or tenderness, or making mockery of family, household, traditions or Spanish customs⁴⁵. However, as pointed out in the previous section, these

³⁹ Fernández Sarasola, *La legislación sobre historieta en España*, cit.

⁴⁰ «El contenido de la publicación es lo de menos; lo que hace falta revisar es el contenido del director: su escrupulosidad, su conocimiento de la infancia, los móviles que le llevan hacia el niño». See C. Gil Roësset, *La Pedagogía en la prensa infantil: Conferencia pronunciada por Consuelo Gil Roësset de Franco el día 22 de mayo de 1947*, Madrid, Escuela Social de Madrid, 1947 (quot. on p. 3).

⁴¹ M. Barrero, *Acercamiento estadístico a la industria editorial de tebeos durante los años cuarenta*, «Historietas», n. 3, 2013, pp. 43-55.

⁴² «Desarrollo que las publicaciones destinadas a niños y adolescentes han adquirido en los últimos años», *Decreto de 24 de junio de 1955, por el que se establecen las normas a que han de ajustarse las publicaciones infantiles y juveniles*, «Boletín Oficial del Estado», 23 July 1955.

⁴³ «Reclaman una ordenación legal que garantice la recta orientación religiosa, moral, política y cultural de las mismas».

⁴⁴ J.A. Ramírez, *El 'comic' femenino en España. Arte sub y anulación*, Madrid, Cuadernos para el Diálogo, 1975.

⁴⁵ *Decreto de 24 de junio de 1955, por el que se establecen las normas a que han de ajustarse las publicaciones infantiles y juveniles*, cit.

regulations were not systematically enforced until the appearance of specialised «readers» in 1964.

The ongoing modernization of Spain forces to redraw the regulations for all of the press in 1966, in order to adapt to the «situation of present times»⁴⁶, but children and teen press will be an exception and the new regulation for it, published in 1967, presents changes that are more cosmetic than real⁴⁷. In the regulation that can affect female publications we can find prohibition of: exaltation of facts or behaviours both negative and immoral; scenes that highlight eroticism or exalt «social defects»; displaying values which threaten Spanish tradition and lifestyle; out of proportion self-worship; and of displaying issues that are not aimed at children readers either because of their nature or their form. The essence of the previous regulation is still present, but coated on a less archaic language.

Having said that, as it can be observed, the regulations are considerably general, which makes the way in which those regulations are interpreted the key to know their impact. An illegitimate love can be interpreted in a broad way, from a relationship with a married person, through a couple in which one of the two people does not have the intention of getting married, to a normal relationship without consent from the parents of one of the two lovers. In the same way, respect to Spanish traditions and lifestyle can be a matter of perspective: Is the regulation referring to the lifestyle of the censor, an adult that has lived the rigid morals of the post-war period or to the lifestyle of the female readers, brought up in a Spain in which consumerism has become a way of life? The testimonies we have gathered lead us to think that, generally speaking, the implementation of the regulations is conservative and strict, to the point of banning the hairstyles of some humoristic characters because they were considered erotic⁴⁸. Also, the interpretation of the regulations by censors can demand the changing of scenes and situations that are not explicitly stipulated in the regulation: «You could not draw a man and a woman by themselves, you always had to add someone else behind them. You could not do a cleavage showing a lot, either. And, mind you, the story always had to end in a wedding»⁴⁹. In the same way, even though during the sixties is normal for women to work outside the household, censorship does not want to show working women excessively independent: «Censorship intervened [the character, a journalist]

⁴⁶ *Ley 14/1966, de 18 de marzo, de prensa e imprenta*, «Boletín Oficial del Estado», 19 March 1966.

⁴⁷ *Decreto 195/1967, de 19 de enero, por el que se aprueba el Estatuto de Publicaciones Infantiles y Juveniles*, cit.

⁴⁸ Fernández Sarasola, *La legislación sobre historieta en España*, cit.

⁴⁹ «No podías dibujar un hombre y una mujer solos, siempre tenías que poner otra persona detrás. Tampoco podías hacer un escote que enseñara mucho. Y, eso sí, la historia siempre tenía que acabar en boda», T. Tinturé, interviewed in «ForoEsther», n. 37, 2013, pp. 13-18 (quot. on p. 16).

Mary Noticias [...] They said: 'This woman is too free. Has she not a family?' We had to represent Christmas, and Mary going home»⁵⁰.

Since many of these children and teen publications are weekly, the publishing houses are the first not to want problems with censorship, because redrawing a page or altering the script unavoidably means going on the market late, while the creative personnel tends to self-censor not only to avoid problems with the authority or the publishing house, but also not to waste -unpaid- working time retouching the censored parts. The custom of self-censorship is confirmed by the fact that Editorial Bruguera, the main comic book publishing house in the sixties and seventies, issues a series of internal regulations stricter than the censorship itself in 1964, so that the work of its writers and artists does not encounter resistance⁵¹. That way, the control system created by the Francoism shows its double usefulness: not only it avoids that comic books which could send messages against the regime are published, but it also makes the publishing houses and authors themselves produce more conservative work than what they would possibly have created in different conditions.

Getting to know in which specific cases censorship was applied instead of the authors censoring themselves is difficult, but at the end of the day the result was the same: the tale exalted the value of love and scorned any other ability women could have. For example, the value of a female police sergeant (a British one, of course, since a female police officer was unthinkable in the Francoist Spain) was not in her ability to solve crimes, but in her ability to make a lad fall madly in love with her: «It has been her best job because she has managed to put me in the golden prison of her heart»⁵². Likewise, a female scientist who lived surrounded by test tubes and microscopes discovered happiness by allowing herself to be carried away by her feminine side (which for the authors meant opting for beauty instead of intelligence): «The feeling of being flattered by men pleases me (...) You have shown me the real value of life!»⁵³. In other words, being a woman came first and being a professional was secondary and that meant developing studies and work outside of home in the gaps left by marital responsibilities, as a young female archaeologist noted as soon as a young lad declared his love to her: «From now on, Egyptology takes second place to my love to him»⁵⁴.

⁵⁰ «La censura se metió con *Mary Noticias* [...] Dijeron: 'Esta mujer va muy suelta. ¿No tiene familia?' Tuvimos que representar que era Navidad, y que Mary iba a su casa». C. Barberà interviewed in «El Periódico», 24 April 2014.

⁵¹ V. Sanchis, *Tebeos mutilados: La censura franquista contra Editorial Bruguera*, Barcelona, Ediciones B, 2010.

⁵² «Ha sido su mejor servicio, porque ha conseguido llevarme a la cárcel dorada de su corazón». «Sissi Selección de Novelas Gráficas», n. 38, 1960.

⁵³ «La sensación de sentirme agasajada por los hombres, me resulta agradable [...] ¡Tú me has hecho conocer el verdadero valor de la vida!». «Sissi Selección de Novelas Gráficas», n. 77, 1960.

⁵⁴ «A partir de este momento, la egiptología pasa a ocupar un segundo lugar en mi vida» («Sissi Selección de Novelas Gráficas», n. 138, 1962).

4. *The Debate on Censoring Legislation*

During Francoism, open criticism to cinematographic censorship inside the cultural scene appears, as it happens during the *Conversaciones Cinematográficas de Salamanca*, cultural conferences centered around cinema that took place in May 1955, where criticism comes from both people against the dictatorship and advocates of it⁵⁵. However, comic book scene was much less prestigious and comments by leading figures of culture wishing a reduction or end of censorship are not known. The writers themselves, when speaking about the time, show absolute compliance with the censoring regulation, not because they agreed with it, but because they could not do anything about it:

It was Francoism. Those were difficult times, you could not raise your voice too much; it was as if you were wearing a corset oppressing you, you would see or feel there was censorship, that there were things that could not be said or narrated, and everyone just tried to live the best we could⁵⁶.

Nevertheless, the dictatorship itself will open -without intention- room for debate. Among the faculties given from 1963 to the Comisión de Información y Publicaciones Infantiles y Juveniles, one is organizing at the Escuela Oficial de Periodismo courses for experts in children and teen press⁵⁷, which in 1967 become mandatory for those wanting to work as publishers of those publications⁵⁸. Among the faculty you can find professionals from pedagogy, psychology, journalism and also -obviously- priests⁵⁹.

One of those professors, Father José María Vázquez, a member of the Comisión de Información y Publicaciones, stands out as a strong advocate not only of the regulation but also of gender segregation. His approach to censorship comes from the necessity of protection of infancy and adolescence, and considers the work the State has done by creating the current regulation highly favourable; having said that, he observes that it cannot nor should be

⁵⁵ R. Gubern, *La censura. Función política y ordenamiento jurídico bajo el franquismo (1936-1975)*, Barcelona, Península, 1981.

⁵⁶ «Era el Franquismo. Eran tiempos difíciles, no podrías levantar muy alto la voz; se veía como si tuvieras un corsé que te estuviera oprimiendo, veías o sentías que había censura, que había cosas que no se podían decir o contar, y cada uno intentaba vivir lo mejor que podía». See C. Pino interviewed, <<http://www.tebosfera.com/1/Documento/Entrevista/Pino/Carlos.htm>> (last access: 06.12.2014).

⁵⁷ *Orden de 30 de septiembre de 1963 por la que se aprueba el Reglamento de la Comisión de Información y Publicaciones Infantiles y Juveniles del consejo Nacional de Prensa*, «Boletín Oficial del Estado», 12 November 1963.

⁵⁸ *Decreto 195/1967, de 19 de enero, por el que se aprueba el Estatuto de Publicaciones Infantiles y Juveniles*, cit.

⁵⁹ *Resolución de la Escuela Oficial de Periodismo por la que se convoca un curso especial para la obtención del certificado-diploma en publicaciones infantiles y juveniles*, «Boletín Oficial del Estado», 11 March 1968.

compared with the ones from different countries due to the «nature of people, their idiosyncrasy, the moral concept each one has»⁶⁰, in different words, father Vázquez believes the regulation and the way it is applied is appropriate for Spain. Continuing its defence of the legislation, he considers the differentiation of magazines according to the gender of their readers appropriate, since «it is indisputable that the educative evolution of girls must be, as a group, different than boys [...]. And the fundamental difference is in the diverse purposes boys and girls have been brought to life for»⁶¹. There is, therefore, a clear defence of the traditional discourse on the innate roles of women and men: teenage boys have a need for «excitement and anxiety. The boy has come from heroism [...]. And in all his readings he looks for examples of men whose life and professions satisfy their yearning for greatness». On the contrary, a teenage girl «feels a strong attraction to everything that teaches her how to be a good mother and housewife. It is her main -and in many cases, only- human calling»⁶².

Along with this discourse, one where you can see a clear biological determinism, we can find another professor, Andrés Romero, from Escuela Oficial de Periodismo de Madrid, who advocates similar postures but with an updated discourse. He understands that female publications have the important role of «making female youth become increasingly aware of its family and social responsibility, actively engaging in everything that represents a service for the community», although he acknowledges the importance of «strengthening institutions like marriage and family to the maximum»⁶³, i.e., a discourse that accepts the involvement of women in public matters as long as they do not neglect their roles as mothers and wives.

Father Vázquez and professor Romero equally stand by the lines drawn by the dictatorship, it is only that one proclaims the traditional discourse of the post-war period and the other flies the flag of the reworked discourse of the seventies. But in front of them we can find moderated professors, i.e., those in favour of segregation but not because they believe it is due to biological motives or a concrete role, instead they think it is due to the way in which men and women are socialised. Professor Esteban Busquets Molas therefore believes that it is not a matter of boys and girl magazines presenting different issues, he thinks instead that it is about presenting those issues in a different way⁶⁴. The same idea is advocated by Montserrat Sarto, a censorship «reader» in Madrid⁶⁵:

⁶⁰ «La forma de ser de los pueblos, su idiosincrasia, el concepto moral que cada uno tiene». See J.M. Vázquez, *La prensa infantil en España*, Madrid, Doncel, 1963 (quot. on p. 95).

⁶¹ Id., *La prensa infantil en España*, cit. (quot. on p. 118).

⁶² Id., *La prensa infantil en España*, cit. (quot. on pp. 119-120).

⁶³ A. Romero, *Medios de comunicación y sociedad*, Madrid, Self publishing, 1971 (quot. on pp. 101 and 110).

⁶⁴ E. Busquets Molas, *La revista infantil de información general*, in Comisión de Información y Publicaciones Infantiles y Juveniles (ed.), *Teoría y técnica de la prensa infantil y juvenil (esquemas)*, Madrid, Comisión de Información y Publicaciones Infantiles y Juveniles, 1966 (quot. on p. 90).

⁶⁵ A. Martín Martínez interviewed by the author.

It has happened that an issue is presented and the girls want more explanations on it, but from a different perspective. Or the opposite, where the boys complain about trifles of a subject -or something that was trivial for them-, and, by contrast, they wished it to be presented in more schematised way⁶⁶.

But are these differences in criteria between boys and girls as absolute as professors Busquets and Sarto point out? Is not possible to argue that the socioeconomic and cultural level, or individual interests and hobbies of each person can also affect the kind of wanted information, without resulting in the creation of magazines classified as «for the middle class» or «for science enthusiasts»? Following that logic, Doctor of Pedagogy Raquel Payá refused to talk about magazines for boys and magazines for girls in a differentiated way in the *II Curso de Especialización en Información y Publicaciones Infantiles y Juveniles*⁶⁷. In the same way, writer and librarian Aurora Díaz-Plaja criticizes the arguments of the moderate groups appealing to the fact that there are many elements that gather or differentiate the target readers, and if they possess similar cultural levels and interests, it is to be expected that they can enjoy of identical contents⁶⁸. Nevertheless, since she acknowledges the fact that the legislation does not allow the creation of teen magazines for both genders, Díaz-Plaja suggests a series of guidelines in order to update female magazines.

The danger of the ‘feminine mystique’ must be avoided, with the return of women to ‘their labours’, when the labours of women themselves have taken a back-seat due to the simplification of the household chores thanks to modern advancements and cultural and social elevation. The woman will be much more interesting and conscious as wife and mother if she knows how to be a companion for the man and she has, like him, her own profession which will make her intellectually and in terms of work closer to the problems of the husband and the sons⁶⁹.

Therefore, she suggests sections about professional orientation, arts and literature, music and television, sports and entertainment, and mailing sections that allow the readers to communicate between them and develop their literary or artistic calling; for their part, if fashion sections exist, they must avoid the universal beauty canons: «fashion sections must have a guiding and practical nature on the best way to dress in harmony with their physical conditions»⁷⁰.

⁶⁶ «Se ha dado el caso de tratar un tema y querer las chicas más explicación sobre él, pero desde distinto prisma. O presentarse el caso contrario quejarse los chicos de nimiedades de un tema –o algo que a ellos les resultaba nimiedades–, y, en cambio, desear que se lo dieran esquematizado». See M.M. Sarto, *Revistas para niños, para niñas, para ambos*, in Comisión de Información y Publicaciones Infantiles y Juveniles (ed.), *Teoría y técnica de la prensa infantil y juvenil (esquemas)*, cit. (quot. on pp. 92-93).

⁶⁷ Sarto, *Revistas para niños, para niñas, para ambos*, cit.

⁶⁸ A. Díaz-Plaja, *La revista juvenil femenina*, in Comisión de Información y Publicaciones Infantiles y Juveniles (ed.), *Teoría y técnica de la prensa infantil y juvenil (esquemas)*, cit. (quot. on p. 95).

⁶⁹ *Ibid.*, p. 95.

⁷⁰ *Ibid.*, pp. 96-97.

We can consider this third way as having a more progressive nature, since it is concerned with breaking a view of the woman as mere mother and wife, although it justifies the role of a professional woman as something to help her to better fulfil those roles (it would have been impossible, in the middle of the dictatorship, to publicly defend the role of women who did not want to marry or be mothers). In fact, many of the proposals of professor Díaz-Plaja will be adopted later, once the dictatorship is over, by some of the most popular magazines for girls of the time, like *Lily* and *Esther*⁷¹.

Conclusions

Censorship during Francoism had a fundamental objective: perpetuating the values of the dictatorship. At first, this was attempted by controlling the directors of publications, although the increase of magazines aimed at children and adolescents in the fifties forced the creation of a particular control structure: a specialised committee close to the dictatorship that could advise the authorities, along with a code of behaviour that would end the complete arbitrariness that dominated the censoring criteria for almost two decades.

In the case of female magazines and comic books, the objective was to reinforce the female roles of mother and wife, especially after the inclusion of women to the paid work force threatened to make their domestic role less attractive. This was achieved by avoiding issues contrary to the ideology of the regime, although since the regulation was so general and the censors criteria could be very subjective, publishing houses and authors were impelled to create stories thinking in advance in what the censor would want to read. Thusly, not only it was avoided that issues that the dictatorship considered sensitive (divorce, adultery, desire, etc.) were featured but also tales were created that were close to the ideals of the regime (idealised love, courtship leading to marriage, women who worked but putting their families ahead of their careers, etc.).

Publishing houses and authors accepted the situation; they did not have a choice. However, when the Ministerio de Información y Turismo started giving courses of experts in children and teen publications, it was possible to perceive a debate between conservative groups (the ones who considered the existence of a biological purpose for women), moderate groups (the ones who accepted a differentiation between men and women, but due to social, not biological factors) and progressive groups (the ones who believed that there should not be a difference when presenting contents and do not think publications should

⁷¹ J.J. Rodríguez Moreno, P. Sepúlveda Navarrete, *Sissi, Lily y Esther: Hijas de su tiempo*, in M. Barrero (ed.), *Tebeos. Las revistas juveniles*, Sevilla, AcyT Ediciones, 2016, pp. 235-301 (quot. on p. 246 and 250).

create a sole model for women). Progressive groups could not possibly have won the debate during the dictatorship, but once it was over, their proposals would be key to understand the approach to female magazines during the first years of Democracy.

Preparatory classes as a form of preschool education in Ukraine during the Soviet Period (the 1920s-1980s): the main stages of their development

Tetiana Havrylenko
Department of History of Pedagogy
Institute of Pedagogics of National
Academy of Pedagogical Sciences of
Ukraine
Kiev (Ukraine)
gavrilenko-tanya@yandex.ru

ABSTRACT: The retrospective analysis of the activity of preparatory classes as a form of preschool education in Ukraine during the Soviet period is carried out in the article. The main stages of formation and development of preparatory classes during the 1920s-1980s are determined and characterised. It is shown that at different stages of their functioning preparatory classes were not only oriented to the preparation of children for systematic schooling, they also arranged conditions for the lowering of school starting age.

EET/TEE KEYWORDS: Preparation classes; Preschool education; Primary education, school; Ukraine; XXth Century.

An important stage in any child's life is a start of systematic schooling which is connected with the changes of environment for its development as well as with the transformations in the activity, new demands and duties, new social status. Purposeful and systematic propaedeutic educational work helps a first former to adapt to school, influences his successful educational activity in the conditions of intensification of training and training load increment. Preschool education plays a priority role in the process of solving such problems, because starting from 2010 it has become compulsory for 5-year old children in Ukraine. As a result in recent years the number of children involved in compulsory preschool education has increased; it positively influences their systematic nonforced preparation for

schooling. At the same time many children do not attend preschool educational institutions for various reasons, and therefore such children often are not enough educated before they start to go to school. One of the alternative ways out may be an arrangement of preparatory groups or classes at secondary schools for children of senior preschool age, this information is underlined in the letter written by the Ministry of Education and Science of Ukraine (August 13, 2014)¹. We should mention that this form of preschool education is not new for modern educational space; it was introduced in Ukraine in the early Soviet period. Therefore, we consider it logical to study the experience of work of preparatory classes during the Soviet period.

Historiographical research showed that the problem of children's training for school was the subject of scientific interest of many scientists in the field of psychology and pedagogics (S.O. Amonashvili, N.M. Bibik, A.M. Bohush, O.L. Venher, V.V. Davydov, D.B. Elkonin, V.K. Kotyrlo, Y.Y. Kravtsova, A.O. Liublinska, O.Y. Savchenko, N.F. Skrypchenko, O.V. Skrypchenko, V.O. Sukhomlynskyi and others). The formation and development of primary education propaedeutic in Ukraine during the Soviet period are revealed in dissertations written by T.M. Bondarenko and N.L. Klochko. However, these scientists pay a great attention to the preparation of children for school in preschool educational institutions, at the same time the peculiarities of preparatory classes are not detailed. L.D. Berezivska, N.M. Bibik, O.D. Zamashkina, Y.P. Kodliuk, L.V. Pyrozhenko, O.Y. Savchenko and other scientists studied the peculiarities of the work of preparatory classes functioning during the second half of the 1970s – the first half of the 1980s. Therefore, retrospection of the problems concerning the formation and development of preparatory classes in Ukraine during the Soviet period was not adequately reflected in historical pedagogical researches, and as a result we consider it important to study this problem.

The main aims of this article are to carry out a retrospective analysis of the work of preparatory classes as a form of preschool education in Ukraine during the Soviet period (the 1920s-1980s) and to determine and characterize the main stages of their development.

According to the People's Commissariat of Education of the Ukrainian Soviet Socialist Republic (the Ukrainian SSR) preparatory groups (in 1934 they were reorganized into preparatory classes)² were formed in the early 1920s. However,

¹ The Ministry of Education and Science of Ukraine, *Lyst Ministerstva osvity i nauky Ukrainy «Instruktyvno-metodychni rekomendaciji shhodo orghanizaciji roboty ghrup dlja ditej starshogho doshkil'nogho viku pry zaghaljnoosvitnikh navchalnykh zakladakh»*, 2014 [online]. Available at: <http://old.mon.gov.ua/ua/activity/education/56/690/normativno_pravova-baza/> (last access: 29.06.2015).

² The Central Committee of the All-Union Communist Party (Bolsheviks) and the Council of People's Commissars of the USSR Postanova CK VKP(b) i RNK SRSR «Pro strukturu pochatkovoji i serednjoji shkoly», *Postanovy partiji ta urjadu pro shkolu*, Kiev – Kharkiv, Radjansjka shkola, 1934, p. 36.

they were few in number (only 1.1% of future pupils attended them in 1924-1925 school year)³; such phenomenon was a result of difficult socio-political and socio-economic conditions under which a new original Ukrainian-Soviet system of education was built. The First World War and Civil War, constant changes of state authority, famine, crop failure caused widespread impoverishment of people; the number of homeless children increased. Therefore, the activity of educational policy at this stage aimed first of all at child social protection and welfare. In the middle of 1920s the rise of industry, agriculture, the needs of school practice caused the reverse process – schooling was stabilized, the number of orphanages was reduced, a positive background for the development of primary schools and preparatory groups was arranged. We should emphasize that at this stage such preschool or preparatory groups aimed at the arrangement of such conditions which helped, as the famous Ukrainian teacher S.O. Siropolko mentioned, to lower the age range for the children who would start to go to school⁴ as well as to prepare 7-8 years old children for schooling.

The Decree on General Compulsory Education (1930) issued by the General Executive Committee and Council of People's Commissars of the Union of Soviet Socialist Republics (the USSR) played an important role in the development of preparatory groups as a form of preschool education. The document stressed the necessity of preschool education for the children (especially for the children from low-income families) before they started to go to a primary school. Teachers, parents, seniors, pioneer organization as well as students of pedagogical educational institutions were suggested to be engaged into the process of training future pupils⁵. The mentioned Decree influenced the formation of a great number of preparatory groups and the number of children educated in such groups increased. For instance, 94.2 thousand children attended preparatory groups in 1932, and 124 thousand children attended them in 1933⁶.

In the first half of the 1930s the following party and government decrees were adopted: The Decree on Academic Programmes and Training Mode in Primary and Secondary Schools (August 25, 1932); The Decree on the Structure of Primary and Secondary Schools (May 16, 1934); Typical Timetable and Training Mode for Primary, Secondary and Incomplete Secondary Schools (1934); The Decree on Academic Work, Rules and Regulations in Primary, Secondary and Incomplete Secondary Schools (September 3, 1935); they defined such organizational bases of preparatory classes activity:

- weekly academic load (no more than four lessons per day);

³ The People's Commissariat of Education of the Ukrainian SSR, *Dijalnistij Narkomosvity Ukrajinjskoho SRR za 1924 – 1925 rik.*, Kharkiv, Derzhavne vydavnytvo Ukrajinij, 1926, p. 35.

⁴ S. Siropolko, *Istorija osvity v Ukrajinji*, Kiev, Naukova dumka, 2001, p. 675.

⁵ The Central Committee of the All-Union Communist Party (Bolsheviks) and the Council of People's Commissars of the USSR Postanova CK VKP(b) i RNK SRSR, *Pro zaghaljne obov'jazkove navchannja*, «Postanovy partiji ta urjadu pro shkolu», 1930, p. 10.

⁶ Siropolko, *Istorija osvity v Ukrajinji*, cit., p. 675.

- arrangement of the school day (classes were given during the first shift no earlier than 8.30 a.m.);
- duration of the lessons (45 minutes: 25 minutes were used for training, and 20 minutes were used for games and physical training classes in the class; there had to be some physical drill during each lesson)⁷.

It was forbidden to gather any meeting with the pupils of the preparatory and primary classes, only class teachers and doctors were allowed to talk to the children for a period of 10-15 minutes: such conversations had to be «active and interesting»⁸.

In accordance with the curriculum used for the pupils of preparatory classes the following lessons were conducted: mother tongue, arithmetic, singing, drawing and physical culture (it did not matter in which school they functioned, and what language the pupils were taught). As we can see from the Table n. 1, the attention was paid to the study of the native language⁹.

N.	Subjects	Working Hours per Week
1.	Native language	8
2.	Arithmetic	4
3.	Singing	2
4.	Drawing	2
5.	Physical culture	2
6	Total	18

Table 1. School Curriculum for Preparatory Classes, 1939. (L. Berezivsjka, *Reformy shkilnoji osvity v Ukraini u XX stolitti: dokumenty, materialy i komentari*, Lugansk, DZ «LNU imeni Tarasa Shevchenka», 2011, pp. 272-274).

⁷ The Central Committee of the All-Union Communist Party (Bolsheviks) Postanova CK VKP(b), *Pro navchaljni prohramy ta rezhym u pochatkovij i serednij shkoli*, «Postanovy partiji ta urjadu pro shkolu», 1932, pp. 30-31; The Central Committee of the All-Union Communist Party (Bolsheviks) and the Council of People's Commissars of the USSR Postanova CK VKP(b) i RNK SRS *Pro strukturu pochatkovoji i serednjoji shkoly*, «Postanovy partiji ta urjadu pro shkolu», 1934, p. 36; The All-Ukrainian Central Executive Committee and the Council of People's Commissars of the Ukrainian SSR Postanova VUCVK i RNK Ukrainijskoji SRR, *Typovij rozporjadok shkiljnykh zanjatj i rezhym dlja uchniv pochatkovoji, nepovnoji serednjoji ta serednjoji shkoly*, «Zbirnyk nakaziv Narodnoho Komisariatu osvity Ukrainijskoji SRR», n. 2, 1934, pp. 3-4; The Central Committee of the All-Union Communist Party (Bolsheviks) and the Council of People's Commissars of the USSR Postanova CK VKP(b) i RNK SRSR, *Pro orghanizaciju navchaljnoji roboty i unutrishnij rozporjadok u pochatkovij, nepovnij serednij i serednij shkoli*, «Zbirnyk nakaziv Narodnoho Komisariatu osvity Ukrainijskoji SRR», n. 25, 1935, pp. 2-3.

⁸ The All-Ukrainian Central Executive Committee and the Council of People's Commissars of the Ukrainian SSR Postanova VUCVK i RNK Ukrainijskoji SRR, *Typovij rozporjadok shkiljnykh zanjatj i rezhym dlja uchniv pochatkovoji, nepovnoji serednjoji ta serednjoji shkoly*, «Zbirnyk nakaziv Narodnoho Komisariatu osvity Ukrainijskoji SRR», n. 2, 1934, p. 3.

⁹ L. Berezivsjka, *Reformy shkilnoji osvity v Ukraini u XX stolitti: dokumenty, materialy i komentari*, Lugansk, DZ «LNU imeni Tarasa Shevchenka», 2011, pp. 272-274.

We should note that in the late 1930s preparatory classes were leveled. Being under threat of war, the government had to stop maintaining such classes¹⁰.

So, during the 1920s-1930s preparatory classes appeared to be a form of preschool education; organizational and content principals of their activity were defined. The functioning of such preparatory classes at this stage proved that the children at the age of seven were able to study systematically under specially organized conditions. As a result the children were offered to start their regular studies at the age of seven. According to the Decree on School Attendance at the Age of Seven prepared by Council of People's Commissars of USSR (September 8, 1943) children at the age of seven were allowed to attend primary classes starting from 1944¹¹. In our opinion, the lower age limit for the children starting their systematic schooling was a positive decision. At the same time we agree with the Ukrainian scientist-teacher V.I. Pomahaiba who mentioned that this transition was made «mechanically, without particular changes in academic curriculums and programmes»¹².

The preparatory classes were resumed in the postwar period. However, according to the annual statistical reports prepared by the Ministry of Education of the Ukrainian SSR, they functioned only in Izmail region, and starting from 1954 in Odesa region just as well (in 1954 Izmail region became a part of Odesa region) in rural areas. The fact is that Odesa region was a multinational one where a large number of ethnic groups lived, particularly the Bulgarians, Moldovans, Gagauzes, Armenians, Albanians and others, who had no opportunity to receive education in their native languages. Therefore, in the course of propaedeutic work with children of national minorities the attention was paid to the process of spoken Russian acquisition and to the training of children who would go to school where Russian was used by teachers. For such preparatory classes special programmes and training manuals were prepared. Thus, in order to teach Gagauz children (Turkic people who lived on the territory of Ukraine, in Odesa region mainly) a special «*Kniha po razvitiiu russkoi rechi dlia podhotovitelnyh klassov shkol s russkim iazykom prepodavaniia*» («Book on Training in Russian for Preparatory Classes at Schools with the Russian Language of Teaching, where Gagauz Children are Studied») was prepared¹³.

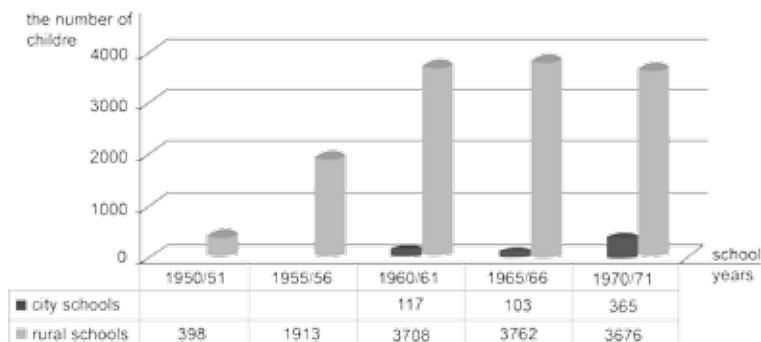
We should note that the number of children receiving preschool education in preparatory classes during the 1950s-1960s decreased significantly in comparison with the previous period. Dynamics of the number of children

¹⁰ Central'nyj derzhavnyj arkhiv vyshhykh orghaniv vlady ta upravlinnja (CDAVO) Ukrajinj [The Central State Archive of the Supreme Authorities and Governance of Ukraine], f. 5127, op. 1, spr. 413, ark. 154.

¹¹ The Council of People's Commissars of the USSR Postanova RNK SRSR, *Pro pryjom ditej 7 rokov do shkoly*, «*Postanovy partiji ta urjadu pro shkolu*», 1943, p. 73.

¹² CDAVO Ukrajinj, f. 5127, op. 1, spr. 413, ark. 154.

¹³ CDAVO Ukrajinj, f. 166, op. 15, spr. 2240, ark. 84.



Pic. 1: Dynamics of the Number of Children Attending Preparatory Classes in City and Rural Schools in Ukraine (1950/51-1970/71 school years) (The Central State Archive of the Supreme Authorities and Governance of Ukraine, Kiev).

attending preparatory classes during 1950/51 – 1970/71 schools years is presented in Pic. 1.

As you can see, the number of pupils attending preparatory classes starting from 1950/51 up to 1960/61 school years grew by 8.5 times¹⁴. During the 1960s – early 1970s the number of children attending preparatory classes stabilized (nearly 4 thousand persons). We should mention that starting from 1960/61 school year preparatory classes were opened at city schools¹⁵, and starting from 1964/65 school year, they appeared on other territory (2 preparatory classes were opened in Kirovohrad region)¹⁶.

The problem concerning the necessity of preschool education for the future pupils, arrangement of larger number of preparatory classes was constantly discussed by teachers at different conferences and meetings, in particular during 1958 – 1959 when a new Law on Consolidation of the Connection between School and Life and on the Further Development of the System of Public Education in the Ukrainian SSR was adopted in 1959. However, the problems were not solved.

We should note that during the 1950s-1960s an alternative to the official school appeared, videlicet original schools arranged by V.O. Sukhomlynskyi, I.H. Tkachenko and other educators. Their conception differed from the traditional Soviet classroom practice in fundamentally new approaches to objective, methods, means of training and education. In particular, it was based on humanistic theory, focused on the development of a child's individuality, fulfilling his (her) creative potential, etc. Special attention was paid to the

¹⁴ CDAVO Ukrainy, f. 166, op. 15, spr. 937, ark. 1; CDAVO Ukrainy, f. 166, op. 15, spr. 3060, ark. 1.

¹⁵ CDAVO Ukrainy, f. 166, op. 15, spr. 3060, ark. 1.

¹⁶ CDAVO Ukrainy, f. 166, op. 15, spr. 4799, ark. 54.

training of children for schooling. Thus, an outstanding Ukrainian teacher V.O. Sukhomlynskyi suggested an original training system for six-year old children before they went to school. The main points of his ideas are reflected in his work «Sertse viddaiu ditiam» («I Give my Heart to the Children»). The teacher considered preschool education to be really important for future first formers. Because it is necessary to teach his or her to think, to perceive, to observe before a child starts to study at school¹⁷. That is why V.O. Sukhomlynskyi arranged a system of innovative methods, techniques, forms of training and education (lessons of thinking in nature, «travels to the origins of thought and word», etc.). He mentioned that a teacher played a great role in preparing children for the systematic educational activity, because a teacher was supposed to prepare them for the schooling so that «they would be able to experience more and more joys of life, that learning would not become sad studies»¹⁸. In addition, the teacher had to learn their individual characteristics, to get to know their inner world, level of health, etc. during the year that preceded their schooling¹⁹.

Thus, during the second half of 1940s – early 1970s preparatory classes were organized for children of national minorities who did not speak Russian. The main attention in propaedeutic work was paid to the process of spoken Russian acquisition, because hereafter the children received primary education in Russian. V.O. Sukhomlynskyi suggested an alternative programme for propaedeutic training of six-year old children in the preparatory classes which was realized in Pavlysh secondary school (Kirovohrad region, Ukraine).

We consider the adoption of the Principles of Legislation of the USSR and Union Republics on Public Education (1973) to be the next stage in the development of preparatory classes. At the legislative level it was mentioned for the first time that the preschool education was possible to be received in preparatory classes. In particular, the following information was mentioned in the article 22 of the Principles of Legislation of the USSR and Union Republics on Public Education: «preparatory classes are organized at schools in order to prepare those children for schooling who will not be educated in their native language, and who do not attend preschool institutions»²⁰. Since that time a number of preparatory classes and children attending them increased significantly. Thus, in 1970/71 school year 4041 children were trained in the

¹⁷ V. Sukhomlynskyj, *Serce viddaju ditjam*, Kharkiv, Akta, 2012, pp. 59-60.

¹⁸ *Ibid.*, p. 70.

¹⁹ *Ibid.*, pp. 59-60.

²⁰ The Supreme Soviet of the USSR (1973) *Osnovy zakonodatel'stva Sojuza SSR i sojuznyh respublik o narodnom obrazovanii*, [online]. Available at: <<http://www.bestpravo.ru/sssr/gn-zakony/m1w.htm>> (last access: 29.06.2015).

preparatory classes²¹, and in 1973/74 school year already 10046 future first formers attended such classes²².

We should note that the growth of preparatory classes in number was also connected with the structural and content transformations within the primary education taken place in the early 1970s. Thus, on the one hand shortening its duration to three years, educational content reformation based on new principles (training at a higher level of complexity, speeding up of the process of studies, teaching more theory, etc.) were positive steps forward, prepared conditions for the development of cognitive activity and independence of junior pupils in the learning process, and on the other hand led to overwork of former pupils; the number of children who had problems with their studies increased, etc. Consequently there was a question concerning the necessity to maintain relatively equal training of children for regular schooling. Preparatory classes appeared spontaneously at secondary schools and preschool institutions²³.

In 1973 «Programme for the Preparatory Classes Functioning at Those Schools where Children were Educated in Hungarian and Moldavian» was prepared; it dealt with the description of knowledge the future first formers should acquire in the preparatory classes²⁴. Later on the Ministry of Education of the Ukrainian SSR issued a letter for teachers of preparatory classes known as «Training and Educational Work in the Preparatory Classes» (1976)²⁵.

Taken into consideration the importance of propaedeutic training of future first formers, and probably in order the preparatory classes did not appear spontaneously and to regulate their activities, the Ministry of Education of the USSR and the Ministry of Finance of the USSR prepared a document called «On Opening of the Preparatory Classes» (June 10, 1977). It was reported that starting from September 1, 1977 preparatory classes could be opened at city and rural secondary schools if necessary²⁶. As we can see, the requirements of teachers concerning preparing of children for regular schooling mentioned in the late 1950s started to be fulfilled only 20 years later. We do not deny the importance of this document in the course of the development of preschool education; but at the same time we are inclined to think that it was adopted behind time.

²¹ CDAVO Ukrajinu, f. 166, op. 15, spr. 7638, ark. 1.

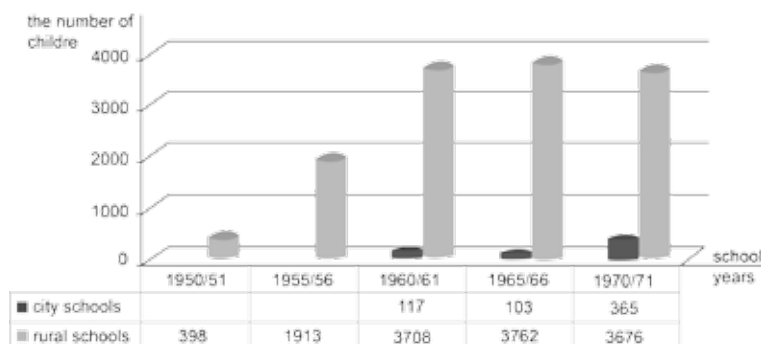
²² CDAVO Ukrajinu, f. 166, op. 15, spr. 8729, ark. 1.

²³ N. Skrypchenko, *Laboratorija navchannja i vykhovannja molodshykh shkoljariv, «Pochatkova shkola»*, 1996, 3, p. 10.

²⁴ The Ministry of Education of the Ukrainian SSR, *Programmy dlja podgotovitel'nyh klassov shkol s vengerskim i moldavskimi jazykami obuchenija*, Kiev, Radjanskaja shkola, 1973.

²⁵ A. Savchenko (ed.), *Uchebno-vospitatel'naja rabota v podgotovitel'nyh klassah*, Kiev, 1976, Radjanskaja shkola.

²⁶ The Ministry of Education of the USSR and the Ministry of Finance of the USSR Lyst Ministerstva osvity SRSR ta Ministerstva finansiv SRSR, *Pro vidkryttja pidghotovchykh klasiv*, Zbirnyk nakaziv ta instrukcij Ministerstva osvity Ukrajinjskoji RSR, n. 17, 1977, p. 31.



Pic. 2. Dynamics of the Number of Children Attending Preparatory Classes in City and Rural Schools in Ukraine (1977/78-1985/86 school years). (The Central State Archive of the Supreme Authorities and Governance of Ukraine, Kiev).

Soon the Ministry of Education of the Ukrainian SSR adopted a Decree known as «On the Preparatory Classes at Secondary Schools and the Organization of Work in them» (July 15, 1977). It was indicated that preparatory classes should be opened at all types of secondary schools where six-year old children who had not attended preschool institutions should be trained in accordance with specially prepared curriculum and programmes before schooling²⁷. Taking into consideration that the majority of rural children did not attend preschool institutions, preparatory classes were opened mostly in rural areas. The preparatory classes and children attending them increased in number every year. Thus, in 1977/78 school year 16.4 thousand of children attended preparatory classes²⁸, and in 1978/79 school year 40.6 thousand of children were trained in such classes²⁹. The number of children educated in preparatory classes increased in the next years, and in 1985/86 school year 162.5 thousand children attended them (it was the maximum number)³⁰, as shown in Pic. 2 prepared on the basis of statistical reports of the Ministry of Education of the Ukrainian SSR.

The preparatory classes aimed at the following main tasks which were defined: physical, moral, labor, and aesthetic education of children, development of their mind and speech, formation of observation skills, analysis of the natural phenomena and social life, development of interest to study, formation

²⁷ The Ministry of Education of the Ukrainian SSR Nakaz Ministerstva osvity Ukraïns'koho RSR, *Pro vidkryttja pidghotovchykh klasiv zaghal'noosvitnjoji shkoly ta orghanizaciju roboty v nykh*, «Zbirnyk nakaziv ta instrukcij Ministerstva osvity Ukraïns'koho RSR», n. 16, 1977, p. 12.

²⁸ CDAVO, f. 166, op. 15, spr. 8986, ark. 14.

²⁹ CDAVO, f. 166, op. 15, spr. 9032, ark. 33.

³⁰ CDAVO Ukraïny, f. 166, op. 15, spr. 9300, ark. 18.

of skills to behave³¹. Therefore, in accordance with the curriculum (Table 2) almost 70% of the class hours were devoted to physical training, eurhythmics, music and singing, drawing and modeling, artistic and technical design and modeling, reading. Special attention was paid to those lessons where hygienic skills; cultural behaviour at school, at home, in public areas; self-help skills were formed. The Programme concerning preparatory classes also aimed at preparing children to study their native languages and mathematics in the first class. For the purpose of general and social development of children a new integrated course called «Acquaintance with the Surroundings» (prepared by N.M. Bibik, N.S. Koval) was introduced into the curriculum. A great attention was paid to the maintenance of sequence between preschool and primary education links while choosing and structuring of education content³². So, taking into account children's psycho-physical peculiarities the Programme provided for the formation of children's knowledge, abilities and skills using understandable material, and it created the background for successful studying in the first class of secondary school.

N.	Subject	Working House per Week
1.	Native Language (Reading and Writing Speech Development)	4
2.	Preparation to Study Mathematics	3
3.	Acquaintance with the Surroundings	4
4.	Physical Training Outdoor Games	5
5.	Drawing Modeling Applique	3
6.	Design	2
7.	Music, Singing, Eurhythmics	3
Total		24

Taken into consideration the age-specific peculiarities of six-year-old children the following conditions for the educational process arrangement in the preparatory classes were suggested: there had to be no more than 25 pupils per class; the lesson had to continue no more than 35 minutes; the dynamic pauses were obligatory; absence of marks and home tasks; the attention was paid to the dominance of game activities; the additional holidays were introduced; extended-day groups were organized at classes; beauty sleep was obligatory, three meals a day; a long walk in the open air, etc.³³. We consider it positive that V.O. Sukhomlynskyi's experience concerning the preparation of

³¹ The Ministry of Education of the Ukrainian SSR, *Programy dlja pidgotovchykh klasiv zaghaljnoosvitnikh shkil (Proekt)*, Kiev, Radjansjka shkola, 1977, p. 2.

³² *Ibid.*, pp. 3-4.

³³ *Ibid.*, p. 5.

six-year-old children for schooling was widely used in the system of work of the preparatory classes³⁴.

In 1981 Central Committee of the Communist Party of the Soviet Union and Council of Ministers of the USSR adopted a Decree called «On the Transfer (as an Experiment) of Primary School Pupils Studying at Secondary Schools to a Five-day School Week and the Introduction of Starting School at the Age of 6», which led to the experiment in the preparatory classes at schools and preparatory groups at preschool institutions in order to find out whether it was possible to start systematic training of children at the age of six at secondary schools with optimal training load³⁵. Without going into the detail concerning its organizational and procedural aspects, we should note that in the process of complex experimental studies (teachers, psychologists, hygienists, physiologists took part in it) (1981 – 1985) carried out in Nizhyn district (Chernihiv region), Volnovakha district (Donetsk region), Radehiv district (Lviv region), the city of Ordzhonikidze (Dnipropetrovsk region), the possibility and the appropriateness of the systematic teaching of children at the age of six were proved; the forms of organization of educational process, content and teaching methods were identified; instructional and teaching materials were prepared; the peculiarities of the process of training, education and development of children under new conditions were revealed; economic, personnel and management aspects in the transfer to teaching children at the age of six were studied³⁶.

In order to support and control the activities of preparatory classes, to carry out a complicated experiment on teaching children at the age of six, the Laboratory of training and education of six-year-old children was opened at the Research Institute of Pedagogics of the Ukrainian SSR, and a lot of famous scientists worked there (N.M. Bibik, M.S. Vashulenko, L.P. Kochyna, N.I. Podhorna, O.Y. Pryshchepa, N.F. Skrypchenko (she was a head of the Laboratory), I.O. Shkolna). During the period of its functioning (1976 – 1985) scientists prepared the programmes for all types of training activities for preparatory classes (teaching reading, writing, working with a child's book, mathematics, acquaintance with the surroundings, manual work, physical training and aesthetic education); they also prepared textbooks and tutorials

³⁴ N. Skrypchenko, *Laboratorija navchannja i vykhovannja molodshykh shkoljariv, «Pochatkova shkola»*, n. 3, 1996, pp. 10.

³⁵ The Central Committee of the Communist Party of Ukraine and the Council of Ministers of the Ukrainian SSR *Postanova CK KPU i Rady Ministriv Ukraïns'koho RSR «Pro orghanizaciju vykonannja v respubliци postanovy CK KPRS i Rady Ministriv SRSR vid 22 sichnja 1981 r. «Pro perevedennja v porjadku doslidu uchniv pochatkovykh klasiv rjadu zagaljnoosvitnikh shkil na p'jatydenyj navchal'nyj tyzhdenj i uvedennja navchannja ditej z 6-richnogho viku»*, [online]. Available at: <http://search.ligazakon.ua/l_doc2.nsf/link1/KP810119.html> (last access: 29.06.2015).

³⁶ N. Skrypchenko, *Doslidne systematyczne navchannja shestyrichnykh ditej u shkolakh i doshkil'nykh zakladakh URSR, Pedagoghika: respublikanskyj naukovometodychnyj zbirnyk*, n. 25, 1986, pp. 42-48.

for six-year-old pupils and manuals for teachers; they published a lot of articles in Republican and all-Union pedagogical journals on teaching six-year-old children; trained teachers, educators, heads of schools in order they were ready to teach and educate such children³⁷. Therefore, the scientists working at the Laboratory made a significant contribution into the primary education propaedeutic, created conditions for the systematic schooling of children at the age of six.

In accordance with the Decree of Central Committee of the Communist Party of the Soviet Union and Council of Ministers of the USSR called «On further Improvement of General Secondary Education of Youth and Conditions of Work in Secondary Schools» (April 29, 1984) starting from 1986/87 school year a transfer to teaching children at the age of six began³⁸. Therefore a new phase in the development of primary education propaedeutic began, and it led to the development of new teaching materials, creating new conditions for training and development of five-year-old children in the preparatory classes.

Thus, during the 1970s-1980s preparatory classes were considered as a form preschool education at the legislative level; they appeared in all regions of Ukraine and the number of children attending them in the middle of 1980s increased (160 thousand children at the age of six attended such classes). We consider the following items carried out during this period to be positive: the development of training and methodological materials for the preparatory classes carried out by scientists at the special Laboratory of training and education of six-year-old children; the accumulation of experiences concerning training and development of children at the age of six and arrangement of appropriate conditions for the transfer of children to the systematic schooling starting from the age of six.

The conducted analysis of the work of the preparatory classes in Ukraine during the mentioned period allowed to come to the following conclusions: preparatory classes as a form preschool education played an important role in the development of primary education propaedeutic during the Soviet period; their functioning arranged conditions for lowering the age range concerning the beginning of systematic schooling. We consider it appropriate to define the following stages of their development, underlining the specific features of each of them: *the 1st stage (the 1920s-1930s)* – the formation of preparatory classes as a form of preschool education; the determination of organizational and content principles of their activity; the arrangement of conditions for the transfer of children to the systematic schooling starting from the age of seven; *the 2nd stage*

³⁷ N. Skrypchenko, *Laboratorija navchannja i vykhovannja molodshykh shkoljariv*, cit., pp. 10-11.

³⁸ The Central Committee of the Communist Party of the Soviet Union and the Council of Ministers of the USSR (1984) *Postanovlenie CK KPSS i Soveta Ministrov SRSR «O dal'nejšem sovershenstvovanii obshhego srednego obrazovanija molodezhi i uluchshenii uslovij raboty obshheobrazovatel'noj shkoly»*, [online]. Available at: <<http://www.bestpravo.ru/sssr/gn-zakony/e1r.htm>> (last access: 29.06.2015).

(the second half of the 1940s-the beginning of the 1970s) – the functioning of preparatory classes as a form of training the national minorities' children in Russian; the emergence and realization of the original authorial system of preparation of six-year-old children for schooling at V.O. Sykhomlynskyi's school: *the 3^d stage (the beginning of the 1970s-1980s)* – the recognition of preparatory classes as a form of preschool education at the legislative level; the quick increase in their number on the territory of Ukraine; the development of the training appliances for preparatory classes carried out by the scientists of the laboratory of training and education of six-year-old children at the Research Institute of Pedagogics of the Ukrainian SSR; the accumulation of experience in training six-year-old children and arrangement of appropriate conditions for the transfer of children to the systematic schooling starting from the age of six.

Aprender en clave de género. El ideal de feminidad en la formación de maestras durante el franquismo

Teresa González Pérez
Department of History and Philosophy
of Science, Education and Language
University of La Laguna (Spain)
teregonz@ull.edu.es

Learning in the key of gender. The ideal of femininity in the training of teachers during the Franco regime

ABSTRACT: The Franco dictatorship reformulated the model of women, in the interest of the ideal of femininity, and made them the legitimating base of the new regime defined by national-Catholicism and patriarchal ideology. The life of women was marked by the normative canon based on homelike discourse and the exaltation of motherhood. The social norms imposed on them by the leading institutions forced them to assume them as their own, unique and true. The symbolic constructions associated with the feminine, with the return to traditional values and the loss of civic rights, imposed the ideology of subordination. The relations between both sexes were endorsed by a propagandistic and formative process. The Falangist ideology, the religious dogmas and the proclamations of the military established the framework of action of women. Although in theory they were subordinate subjects, the role played by women in the family structure was very prominent.

The main objective of this article is to know the ideal of femininity of Spanish women, education and the learning of gender postulates in the formation of the teachers who in turn would be responsible for the education of the new generations during the Franco regime. We intend to make the differentiated formation visible in the context of the Francoism, with the imposition of a curriculum in teaching marked by religion, national history, the exaltation of moral values (honor, authority, chastity, self-denial and honor), domesticity and motherhood. The methodology follows the design of educational historiography with a gender focus. We consult primary and secondary sources (legislation, curricula, programs, textbooks, magazines, newsletters, etc.).

EET/TEE KEYWORDS: History of education; Francoism; Ideal of femininity; Teachers; Curriculum; Spain; XXth Century.

Introducción

Finalizada la guerra civil española (1936-1939) los vencedores impusieron su proyecto reforzado por el orden militar totalitario, con la legislación dictada al efecto. El nuevo modelo social se sustentaba en los valores tradicionales y en la moral católica así como en la redefinición de las identidades y las relaciones de género, es decir, de la feminidad y masculinidad. Desde el primer momento la política del régimen anuló los derechos de las mujeres aprobados por el gobierno de la Segunda República. La línea ideológica inicial se mantuvo tras los primeros años de posguerra. De forma que la primera etapa del franquismo se caracteriza por la pretensión de reproducir los modelos políticos y sociales del fascismo europeo, con un discurso combativo y doctrinario. La construcción del género en la década de los años cuarenta se plantea desde posiciones tradicionales, en donde se perfila de forma indisoluble e inseparable la identidad de las mujeres ligada a su papel en la familia, como educadora de los hijos y perfecta esposa relegada al hogar doméstico. Se apoyaba en la labor de reconstrucción fomentado con un discurso de carácter biológico, según el cual existen diferencias específicas entre los hombres y las mujeres. Para ellos se destacaban capacidades relacionadas con la razón y el intelecto, mientras para ellas se realizaban las aptitudes relacionadas con la sensibilidad y la afectividad. A nivel de género, el hombre se identificaba con la figura del «soldado y padre de familia» mientras la mujer debía adoptar el papel pasivo de «esposa y madre abnegada». Si bien, el propio discurso fascista también supuso encuadrarlas en la Sección Femenina de Falange, con la adopción de «seudo» modelos masculinos y militares para las mujeres.

De manera que durante la primera década, el franquismo encauzó su política de género a fomentar la imagen tradicional de las mujeres en su papel como esposa, madre y educadora. Para ello trazó una política natalista, de promoción del hogar y de la maternidad, y promulgó leyes que limitaban la participación de mujeres en el ámbito laboral, reduciéndola prácticamente a la vida doméstica. La legislación, la Sección Femenina y la iglesia católica construyeron el ideal de mujer en torno a la domesticidad católica, quedando patente la subordinación femenina al orden masculino. Imperó el modelo social paternalista, en el que se otorgó un lugar sobresaliente a la familia. La identidad femenina se modeló mediante la redefinición de los roles de género atribuidos social y culturalmente a las mujeres en la sociedad patriarcal franquista.

No obstante, el panorama de las españolas, por lo general, estaba en sintonía con el papel de las mujeres de las posguerras europeas. La política natalista que potenciaba el franquismo fue semejante a la que desarrollaron los regímenes europeos tras la Primera Guerra Mundial, y lo hicieron tanto los regímenes totalitarios como los no totalitarios. De modo que las españolas, como las europeas de las dos posguerras mundiales, asumieron la misión hogareña y la función reproductiva, encomendada políticamente en esos momentos. Es

más, las mujeres respondieron al papel encomendado para la reconstrucción de la patria a través de la natalidad y de su papel de cauce de reinserción en la sociedad de los que habían sufrido los efectos de la guerra. También asumieron responsabilidades interviniendo en cuestiones ajenas a su rol dada la pérdida de hombres en la guerra¹.

La etapa fascista del primer franquismo se cierra en 1943, tras la derrota de las potencias del eje (Italia y Alemania) en Segunda Guerra Mundial. Con un contexto internacional desfavorable para las potencias fascistas se deja notar la pérdida de poder e influencia por parte de los falangistas, que pasaron a ocupar un papel secundario². A partir de este momento los modelos proyectados por el régimen se concretaron en la figura del padre trabajador para los hombres, y para las mujeres en ama de casa, esposa y madre a tiempo completo. El papel asimétrico en las relaciones de género, que progresó en la sociedad española durante la etapa franquista, afectó a todas las esferas de la vida. Sin embargo, dicha construcción de las relaciones de género presentaba contradicciones. Los roles de muchas mujeres, en su práctica cotidiana, escapaban de su papel como sujetos pasivos. Dadas las necesidades familiares y personales afrontaron las diversas realidades y tuvieron protagonismo en sus propios entornos³.

Desde los años cincuenta las mujeres recibieron influencias de variados factores procedentes de distintos ámbitos y el ordenamiento jurídico recogió los cambios experimentados. La legislación se modificó a partir de 1950, once años después de finalizar la Guerra Civil española, y cinco años después de concluir la Segunda Guerra Mundial. En esas fechas Europa se recuperaba de su particular posguerra y de su fuerte crisis económica, aunque dicho panorama tuvo escasa repercusión en el ámbito español⁴.

Durante los años cincuenta y sesenta del pasado siglo, se produjeron pocos cambios en la mentalidad social, de manera que seguían reproduciéndose los ancestrales estereotipos. Los roles de género continuaban legitimando las funciones sociales que las mujeres venían desarrollando en el ámbito privado, reforzadas con el modelo educativo femenino imperante a lo largo de la historia⁵. Aunque las mujeres progresivamente irrumpían en otros escenarios y se abrían nuevos espacios. La adjudicación de arquetipos tradicionales en función del género, con un significado diferencial de los comportamientos y tareas asignadas a uno y otro sexo, marcados por la jerarquía patriarcal y

¹ M. Yusta Rodrigo, *Mujeres para después de una guerra mundial*, en H. Gallego Franco, M^a C. García Herrero, *Autoridad, Poder e Influencia*, Barcelona, Icaria editorial, 2017, p. 136.

² B. de Riquer, *La dictadura de Franco*, Volumen 9 de *Historia de España* (J. Fontana, R. Villares, dir.), Barcelona, Crítica-Marcial Pons, 2010, p. 474.

³ T. Morant i Ariñó, *Die Frauenabteilung der spanischen Falange und die europäischen Faschismen, 1933-1945*, «Historia Scholastica», vol. 1, n. 1, 2015, pp. 42-56.

⁴ S. Cayuela Sánchez, *Por la grandeza de la patria. La biopolítica en la España de Franco (1939-1975)*, Madrid, FCE, 2014, pp. 45-82.

⁵ T. Morant i Ariñó, *Die Frauenabteilung der spanischen Falange und die europäischen Faschismen, 1933-1945*, «Historia Scholastica», vol. 1, n. 1, 2015, p. 45.

prácticas desiguales discriminatorias fue uno de los rasgos del franquismo secundados por la Sección Femenina. En esta etapa se consolidaron actitudes culturales en torno a la feminidad y la masculinidad, que han marcado historia y normalizado conductas discriminatorias que han tenido consecuencias negativas para las mujeres españolas.

La formación del magisterio femenino fue clave para consolidar el proyecto de nación. El itinerario académico, sujeto a la variable de género, se encorsetó en los postulados falangistas y religiosos que definían la conciencia patriótica y católica. La formación inicial de las maestras sustentó las diferencias de género, dado que las maestras eran agentes socializadoras, eficaces para la transmisión a las nuevas generaciones del discurso ideológico y de las de pautas de conducta, en función de los esquemas prefijados.

Nuestro objetivo es conocer los sesgos de género y el ideal de feminidad que se proyectaron en la educación y en la formación inicial de las maestras en España durante la dictadura franquista (1936-1975). Pretendemos analizar la formación de los modelos hegemónicos, desarrollados con políticas educativas específicas, que construyeron los modelos femeninos que se transmitieron durante el franquismo. La metodología sigue el diseño de la historiografía educativa con enfoque de género, de acuerdo con los planteamientos metodológicos de los estudios feministas. Se trata de un trabajo de investigación de revisión teórica, para ello hemos empleado fuentes primarias y secundarias, además de la bibliografía. Consultamos documentos oficiales, legislación, revistas, boletines, planes de estudio y libros de texto siguiendo las huellas en la redefinición de los modelos femeninos.

1. *Las mujeres, un pilar para la nueva sociedad*

Las ideas doctrinarias marcaron una imagen estructurada, aceptada de forma generalizada, que extendió el perfil de hombre y mujer de acuerdo a sus principios ideológicos. El ideal de ángel del hogar y de la domesticidad que propulsó el régimen dictatorial convertía a las mujeres en garantes de la vida privada y depositarias de los valores religiosos morales⁶. Las mujeres tenían asignada la maternidad por excelencia, así la educación las orientó hacia la vida

⁶ M. Cánovas, *Influencia social de la mujer*, «La Mujer de Acción Católica», n. 13, junio 1938, p. 8. Se modela la feminidad de acuerdo con los valores morales del nuevo orden: «En el nuevo Estado, la mujer tendrá que ser el prototipo de la mujer verdaderamente cristiana y por lo tanto española, tendrá que abandonar el ambiente de frivolidad en que ha vivido estos últimos años, con un olvido absoluto de su misma condición de mujer» («Mujeres Católicas de España», n.º 9, febrero 1938, p. 3. Al respecto publicó en sus páginas: «Lástima grande que mientras están derramando nuestros jóvenes su sangre para vencer a los comunistas, nuestras jóvenes se dejen vencer en retaguardia por el descoco y la licencia, que es el sello del comunismo».

del hogar y al espacio privado. El trabajo de las mujeres era la dedicación al hogar de forma exclusiva y gratuita. Tenía el máximo protagonismo puertas adentro. Un espacio que le confería múltiples competencias. El trabajo remunerado y el espacio público se reservaba a los hombres. No obstante, las mujeres de las clases populares desempeñaban diversos oficios y trabajos.

La Falange fue uno de los organismos que contribuyó a la generación del discurso ideológico referido al modelo de hombres y de mujeres españolas. Tanto la Sección Femenina como el Frente de Juventudes primero y la Organización Juvenil Española después marcaron los roles sexuados que se prolongaron en el tiempo. Durante todo el periodo el discurso se fue adaptando a las exigencias políticas que el régimen iba demandando para la formación de los hombres y de las mujeres⁷. Además la Falange se encargó del adoctrinamiento y del modelo de identidad de género relacionados con la feminidad y masculinidad fascista, especialmente con la exaltación de la virilidad. El discurso de la feminidad presentaba aristas contradictorias porque en ocasiones se alejan del perfil diseñado. La Falange femenina, organización jerárquica y piramidal, era una copia de la Falange masculina, una versión fiel que consolidaba la separación de sexos⁸. Mantuvo situaciones privilegiadas durante todo el franquismo, representando un «feminismo conservador» aunque sus experiencias vitales eran distintas⁹. Los nuevos modelos de género presentes en sus discursos fueron elaborados por una cultura política de hegemonía masculina, con la persistencia de roles tradicionales que conformaron las identidades de género¹⁰. Los discursos de Pilar Primo de Rivera insistían en la identidad de género fundamentada en la domesticidad y en la separación de esferas¹¹.

En el discurso del nacional-catolicismo, la mujer desempeñaba una función de reconquista espiritual y política, desde el ámbito doméstico, como transmisora de valores religiosos y morales en la familia¹².

⁷ A. Cenarro Laguna, *Trabajo, maternidad y feminidad en las mujeres del fascismo español*, en A. M^a Aguado, T.M^a Ortega (coord.), *Feminismos y antifeminismos: culturas políticas e identidades de género en la España del siglo XX*, Universitat de València, Servei de Publicacions, 2011, p. 233.

⁸ S. Tavera García, *Las mujeres de la sección de la falange: una firmación entre el activismo político y la sumisión patriarcal, 1934-1939*, en Aguado, Ortega López (coord.), *Feminismos y antifeminismos: culturas políticas e identidades de género en la España del siglo XX*, cit., p. 220; M.A. Fernández Jiménez, *Pilar Primo de Rivera: el falangismo femenino*, Madrid, Editorial Síntesis, 2008.

⁹ J. Labanyi, *La apropiación estratégica de la entrega femenina: identificaciones transgenéricas en la obra de algunas militantes falangistas femeninas*, «Revista Científica de Información y Comunicación», n. 6, 2009, p. 424.

¹⁰ Tavera García, *Las mujeres de la sección de la falange: una firmación entre el activismo político y la sumisión patriarcal*, cit.

¹¹ Labanyi, *La apropiación estratégica de la entrega femenina: identificaciones transgenéricas en la obra de algunas militantes falangistas femeninas*, cit., p. 424.

¹² M. Moreno Seco, *Mujer y culturas políticas en el franquismo y el antifranquismo*, «Pasado y memoria. Revista de historia contemporánea», n. 7, 2008, p. 167.

La identidad femenina se conformaba desde el ámbito privado, se definía en base a su rol, alejada de conocimientos científicos que carecían de utilidad para la vida doméstica. La redefinición de la educación de las mujeres en los términos hogareños, de acuerdo con el perfil tradicional que convenía al régimen¹³. La misma identidad atribuida a las mujeres desde época ancestral, que ahora el régimen político presentaba muy actualizada, remozada y enaltecida, emulando el prototipo de «mujer nueva», apoyada en el referente de la organización femenina de Alemania hitleriana¹⁴. Consiste en el contra modelo de mujer ideal que el franquismo promocionó a través de la educación frente a la etapa anterior. Se trataba de una educación amparada en el rol tradicional con la que se construye la identidad y se inculca esas ideas a través de la educación, y así figura en los manuales de economía doméstica¹⁵. Unos prototipos que marcaron el ideal de mujer anclada en valores de carácter tradicional y para ello recibiría la formación adecuada¹⁶. Se impulsaba el patriotismo y la religiosidad, enfoque básico del nacionalcatolicismo sobre todo en las primeras décadas de fortalecimiento del franquismo, donde las mujeres constituían una pieza clave. El aspecto patriótico, religioso y moral eran los ejes sobre los que giraba la educación de las niñas y mujeres. Para ello se formaba al magisterio femenino con idénticos parámetros.

El pensamiento tradicional definía el rol femenino en base a la obligación de asumir la responsabilidad del trabajo doméstico como ocupación gratuita, además de la maternidad, la atención de los hijos y del marido. Algunas mujeres españolas respondieron con resignación, ante la persistencia de tradicionales y preconcebidos roles sexuales. En general, no ofrecieron resistencia a la hegemonía masculina. La adaptación y la asunción de los roles se hallaba estrechamente unida a la mentalidad del momento y a la aceptación, a la vez que respondía también a las presiones sociales con la finalidad de no sufrir rechazo y desprecio. El género femenino en el franquismo, presenta una construcción rígida, que es difícilmente aplicable al conjunto de las mujeres españolas. El propio régimen, generó diversas contradicciones entre lo que marcaba el discurso, la legislación y la realidad. Ellas se fueron adaptando a los nuevos modelos de género presentes en los discursos elaborados por unas culturas políticas controladas desde el poder. Las relaciones entre las identidades de género y las culturas políticas que se sucedieron en la España del franquismo estaban sujetas a los esquemas androcéntricos.

¹³ C. Domingo, *Casar y cantar. Las mujeres bajo la dictadura franquista*, Barcelona, Lumen, 2007, pp. 69-70.

¹⁴ A. Morant i Ariño, *Estado totalitario y género: el referente alemán para la Sección Femenina de Falange, 1936-1945*, «Alcores: revista de historia contemporánea», n. 13, 2012, pp. 63-83.

¹⁵ M. Carreño, T. Rabazas, *Sobre el trabajo de ama de casa. Reflexiones a partir del análisis de manuales de Economía doméstica*, «Revista complutense de educación», vol. 21, n. 1, 2010, p. 62.

¹⁶ J.C. Manrique Arribas, *Incidencia del ideal de mujer durante el franquismo en el ámbito de la familia y la actividad física*, «Feminismo/os», n. 23, 2014, p. 52.

A lo anterior añadir que el género como construcción cultural se modifica con la sociedad y la cultura¹⁷, aunque influyen también otros rasgos. La construcción y recepción de las identidades de género entre las españolas no fue un proceso cerrado. Ellas negociaron sus identidades en la vida cotidiana, se adaptaron y readaptaron desafiando la dictadura patriarcal. Todos los indicadores teóricos insisten en que se pretendía formar a las niñas y jóvenes como mujeres que se encargaran en exclusiva del hogar y de los hijos¹⁸. Sin embargo, las mujeres no se dedicaron únicamente al hogar, hubo casos en que desarrollaron actividades fuera del entorno doméstico, porque la propia economía familiar necesitaba de su contribución para la supervivencia¹⁹. De acuerdo con los planteamientos de la teoría de la interseccionalidad, el género estaba en relación con otras identidades culturales y sociales²⁰. Los referentes históricos femeninos fueron la reina Isabel la Católica y Santa Teresa de Jesús, a modo de símbolos y modelos identitarios²¹. A través de estas figuras se construyó el espacio identitario propio dentro de la Falange. La reina Isabel la Católica fue el gran referente de la Sección Femenina, incluso la inicial «Y» de su nombre constituyó un distintivo emblemático, desde la revista «Y» a las condecoraciones e insignias²². De manera que la figura de la reina Isabel la Católica equivalía a demostrar que las mujeres podían contribuir a la sociedad²³.

2. Educando mujeres para el hogar y la patria

La identidad de género se fortaleció a través del perfil ideológico y de los mensajes adoctrinadores que recibían las mujeres. Para las españolas se construyó un nuevo modelo de mujer «para la patria» basado en los arquetipos

¹⁷ J. Butler, *El género en disputa. El feminismo y la subversión de la identidad*, Barcelona, Paidós, 2007, p. 272; G. Di Febo, “Nuevo Estado”, *nacionalcatolicismo y género*, en G. Nielfa (ed.), *Mujeres y hombres en la España franquista: Sociedad, economía, política, cultura*, Madrid, Universidad Complutense, pp. 19-44.

¹⁸ M. Peinado, «‘Las mujercitas’ del franquismo»: como enseñar y aprender un modelo de feminidad (1936-1960), «Estudios Feministas», Florianópolis, vol. 24, n. 1, janeiro-abril 2016, p. 282.

¹⁹ Yusta Rodrigo, *Mujeres para después de una guerra mundial*, cit.

²⁰ R.L. Platero, *Introducción: La interseccionalidad como herramienta de estudio de la sexualidad*, en Id. (ed.), *Intersecciones. Cuerpos y sexualidades en la encrucijada*, Barcelona, Bellaterra, 2012, pp. 15-72.

²¹ I. Ofer, *Historical models-contemporary identities. The Sección Femenina of the Spanish Falange and Its Redefinition of the Term ‘Femininity’*, «Journal of Contemporary History», vol. 40, n. 4, 2005, p. 667.

²² M. Rosón Villena, *Género, memoria y cultura visual en el primer franquismo*, Madrid, Ediciones Cátedra, 2016, p. 72.

²³ I. Ofer, *Señoritas in Blue: The Making of a Female Political Elite in Franco’s Spain. The National Leadership of the Sección Femenina de la Falange (1936-1977)*, Sussex Studies in Spanish History, Sussex Academic Press, 2009, p. 61.

decimonónicos que sustentaban la sociedad tradicional²⁴. Los roles se reflejaron en la educación, que perpetuaron las diferentes misiones correspondientes a mujeres y hombres en la sociedad. Desde la escuela las niñas recibían una formación específica como pequeñas mujeres, orientada al hogar. Se legisló en este sentido porque se planeaba un futuro donde «debía ser, ante todo, ama de casa» y no traspasar la frontera doméstica²⁵. Unos prototipos que marcaron el ideal de mujer anclada en valores de carácter tradicional y para ello recibiría la formación adecuada. Las ideas doctrinarias marcaron una imagen estructurada, aceptada de forma generalizada, y extendió el perfil de acuerdo a sus principios ideológicos²⁶.

La Sección Femenina con su política de género intervino en la reconstrucción ideológica. Dicha institución reivindicaba la importancia de las mujeres a nivel familiar y social, definió las cualidades y las funciones requeridas para cumplir con su misión²⁷. A través de los programas educativos de la educación formal, los cursos y propaganda difundieron el perfil a transmitir de manera insistente²⁸. La formación se encaminaba cumplir con los objetivos del ideal de feminidad, desde la infancia había que capacitarla para la vida privada²⁹. Sin duda el discurso de género estaba interrelacionado con la ideología falangista. Así la educación de las mujeres que desarrolló la Sección Femenina seguía el planteamiento falangista de separar las funciones de las mujeres de las funciones de los hombres³⁰. La Sección Femenina encargada de la transmisión de valores morales y políticos del régimen de Franco, en su intento de que las españolas

²⁴ Manrique Arribas, *Incidencia del ideal de mujer durante el franquismo en el ámbito de la familia y la actividad física*, cit., p. 53. I. Abad, *Las dimensiones de la 'represión sexual' durante la dictadura franquista*, «Revista de Historia Jerónimo Zurita», n. 84, 2009, p. 74.

²⁵ E. de Dios, *Domesticidad y familia: ambigüedad y contradicción en los modelos de feminidad. Ambigüedad y contradicción entre los modelos de feminidad en el franquismo*, «Feminismos», n. 23, 2014, p. 26.

²⁶ Manrique Arribas, *Incidencia del ideal de mujer durante el franquismo en el ámbito de la familia y la actividad física*, cit., p. 51.

²⁷ *Vosotras, camaradas casadas, también tenéis una misión*, Medina, 1944, p. 3. Pilar Primo de Rivera, delegada Nacional de Sección Femenina, en el III Congreso celebrado en Zamora (1939) manifestó: «Lo que tenemos nosotras que hacer es preparar a todas las camaradas para que, cuando tengan una casa y cuando tengan unos hijos, sepan inculcarles en su espíritu este modo de ser de la Falange; sepan enseñarles, después del Padrenuestro, lo que José Antonio nos enseñó a nosotros, y les hagan sentir esa misma fe que sintieron nuestros Caídos, al entregar alegremente la vida por la Patria. Y así, sin daros cuenta, sin exhibiciones públicas que no son propias de mujeres; sin discusiones de mal gusto, sino metidas en el seno de la familia que es vuestro único puesto, habréis hecho por España mucho más que todos los discursos y todas las peroratas del viejo estilo. Habréis separado definitivamente a la generación de vuestros hijos de todos los vicios y de todos los resabios de las generaciones anteriores a la vuestra».

²⁸ A. Morant i Ariño, «Para influir en la vida del estado futuro»: discurso y práctica falangista sobre el papel de la mujer y la feminidad, 1933-1945, «Historia y política: Ideas, procesos y movimientos sociales», n. 27, 2012, pp. 134-141.

²⁹ Manrique Arribas, *Incidencia del ideal de mujer durante el franquismo en el ámbito de la familia y la actividad física*, cit., p. 55.

³⁰ K. Richmond, *Las mujeres en el fascismo español*, Madrid, Alianza, 2004, p. 32.

asumieran sus funciones tradicionales, se responsabilizó de la educación doméstica, política y social de las españolas a lo largo de la vida del régimen dictatorial³¹.

La función de la Sección Femenina consistió en intervenir en las vidas de las demás mujeres para conseguir su conformidad con los objetivos sociales y políticos del régimen y hacerlas servir como modelos de los roles tradicionales en función de su sexo³².

A veces ofrecían una especialización en tareas derivadas de las actividades ejercidas en el hogar, consideradas estrictamente femeninas. Los conocimientos y destrezas que proveían estas enseñanzas podían facilitar a las mujeres, un trabajo remunerado, sin tener que abandonar el ámbito doméstico como, por ejemplo, corte, confección, labores de aguja. Estas actividades las podían realizar en el hogar y no descuidaban la familia ni entraban en competencia con el trabajo masculino. El «trabajo como una necesidad económica» reconciliaba el debate porque muchas mujeres solas (viudas, solteras) necesitaban del trabajo asalariado. El programa de la Sección Femenina para todas las mujeres presentaba un doble objetivo, devolver a las mujeres al hogar y fomentar su aportación a la economía nacional³³. Además las disciplinas especiales: religión, formación política y educación física remarcaban el perfil femenino. La jerarquía eclesiástica y la Sección Femenina elaboraban los contenidos con una concepción ideológica moralizante. La atención que reciben estas materias es importante. Intensifican la doctrina ideológica y la preparación de acuerdo con los principios del nacionalcatolicismo³⁴. El objetivo aleccionador de controlar la conducta en la vida cotidiana y en la académica, de acuerdo con la orientación educativa que el régimen político pretendía. Es decir, modelar el pensamiento de las nuevas generaciones y de sus futuras maestras en aras de lograr la mujer y maestra falangista. Era patente el control institucional de las creencias, de los comportamientos y estereotipos vinculados a los intereses franquistas, la reproducción del discurso hegemónico, en las formas de vida y la transmisión a las nuevas generaciones.

Destacar la uniformidad de contenido y metodologías con que se desarrollaban estas enseñanzas. Las profesoras eran elegidas y formadas por la Sección Femenina, en el centro de formación de instructoras, unas instalaciones que disponían para tal fin. Además ellas se ocupaban de la elaboración y

³¹ Vid. M.A. Fernández Jiménez, *Pilar Primo de Rivera: el falangismo femenino*, Madrid, Editorial Síntesis, 2008; M. Moreno Seco, *Mujer y culturas políticas en el franquismo y el antifranquismo*, «Pasado y memoria: Revista de historia contemporánea», n. 7, 2008, pp. 165-185; R. Sánchez López, *Entre la importancia y la irrelevancia: Sección Femenina de la República a la transición*, Murcia, Editora Regional de Murcia, 2007; J. de Juana López, J. Prada Rodríguez, *Nuevas perspectivas en el estudio de la mujer durante el Franquismo*, Madrid, Silex Ediciones, 2017.

³² Richmond, *Las mujeres en el fascismo español*, cit., pp. 42-43.

³³ *Ibid.*, p. 56.

³⁴ S. Ramos Zamora, *Maestras represaliadas por el gobierno franquista*, «Arenal», vol. 12, n. 1, 2005, p 122.

publicación de los libros de texto en los que estudiaban las alumnas, cuyos contenidos pretendían la interiorización de la imagen de mujer que el régimen había previsto. El desempeño de las tareas docentes en los centros educativos al mismo tiempo servía para observar e informar del funcionamiento de estas instituciones³⁵. Para la regeneración nacional se consideraba fundamental la eficiencia doméstica y el desarrollo de las habilidades hogareñas³⁶. Así planificó la educación acorde a ese papel y trazó un currículum con asignaturas específicas para niñas³⁷, tales como las Enseñanzas del Hogar; una materia que se introdujo en la enseñanza primaria, y se mantiene a lo largo de todo el ciclo educativo, con el objetivo de completar la formación de las niñas con la perspectiva de una mujer, para ser una perfecta ama de casa. El diseño curricular diferenciado según el sexo asignaba funciones distintas a los niños y a las niñas, de manera que animaba a las mujeres a dedicarse al hogar, y a los varones a prepararse para el mundo laboral³⁸. Las Enseñanzas del Hogar fueron ideadas para las mujeres de todos los sectores sociales, igual que sucedía con otras materias. Sin embargo, el planteamiento variaba de acuerdo con el estrato social al que se dirigían. Así, a través de la educación, pretendían promover el papel de mujer esposa-madre-cuidadora del hogar, en las capas más privilegiadas y en las clases medias. En cambio, en los sectores trabajadores su finalidad era moralizar a la clase obrera en torno a los valores de orden, responsabilidad, higiene, previsión y ahorro así como favorecer el desarrollo familiar. El ama de casa de clase obrera también tenía que contribuir a la adoctrinación de la familia y transmitir los valores vigentes. La presentación acrítica de la figura de las madres con un mensaje centrado en estereotipos incuestionables se mantuvo a lo largo del régimen de forma invariable, igual que el cuerpo femenino asociado a la maternidad. La construcción cultural de roles estaba sujeta a la clase social y a los saberes domésticos que se requerían en la práctica en orden al estatus. Por ejemplo, el tipo de bordados y manualidades se trabajaban con mayor sofisticación en los sectores acomodados.

En otro orden, indicar que la Sección Femenina también desarrolló actividades asistenciales y de regeneración social en las que tenían una participación activa las mujeres, siempre para apoyar al régimen y en este sentido orientó su control y propaganda³⁹. Los limitados recursos, para hacer frente a su programa, les indujeron a aceptar donativos para financiar sus programas. Más tarde a

³⁵ Richmond, *Las mujeres en el fascismo español*, cit., p. 117.

³⁶ M. Bolufer, M. Burguera, *Género y modernidad en España: de la ilustración al liberalismo*, Madrid, Marcial Pons, 2010, p. 201.

³⁷ Vid. K. Mahamud, *Mother Nature at the service of the fatherland. Scientific knowledge in primary education reading books during the Franco dictatorship (1939-1959)*, «History of Education & Children's Literature», vol. 7, n. 2, 2012, pp. 267-276.

³⁸ N. Lagos Arias, *Memorias de una educación represiva*, «Revista Murciana de Antropología», n. 23, 2016, pp. 210-212.

³⁹ Richmond, *Las mujeres en el fascismo español*, cit., p. 132.

consecuencia de su raquítico presupuesto y dado que la financiación por parte del gobierno era insuficiente determinaron fijar una cuota⁴⁰.

Dentro de las continuidades del régimen hubo transformaciones. La ideología de género hegemónica experimentó transformaciones en la línea de la evolución que experimentaban las condiciones sociales y culturales del país. El anacrónico ideal de feminidad católico y patriótico tuvo que competir con los nuevos modelos de feminidad, que avanzaban en consonancia con los ritmos de la sociedad de consumo. El esfuerzo por mantener el orden tradicional de género chocó con una «modernización imparable» de los roles, por lo que tuvo que conciliar con otras iniciativas que impulsaban una mayor participación de las mujeres⁴¹. Así la Sección Femenina promocionó un “híbrido” entre la mujer tradicional y la mujer moderna, conjugando el ideal hogareño nacionalcatólico con la diversidad de espacios por los que las mujeres transitaban. La paulatina y progresiva transformación que iba experimentando España en la década de los sesenta con el despegue económico se vio acentuada por las mejoras en el nivel de vida. La promulgación de la ley sobre derechos políticos, profesionales y de trabajo de la mujer (Ley 56/1961 de 22 de julio, BOE-A-1961, n° 14132) favoreció la incorporación laboral de las mujeres (que fue reformada en 1970) además de los efectos del movimiento feminista que se plasmará en la década siguiente. El acceso de las mujeres al trabajo remunerado condujo a la Sección Femenina a organizar el Departamento de Trabajo de la Mujer.

3. *El ideal de feminidad en las publicaciones de la Sección Femenina*

La Sección Femenina desplegó una intensa actividad orientada a la re-educación de las mujeres de acuerdo con su ideario, con atención especial a las maestras y aspirantes al magisterio. En su propuesta identitaria anulaban los principios democráticos, dirigiendo la educación hacia los modelos tradicionales, inculcando el nacionalcatolicismo⁴². Las publicaciones de la Sección Femenina para la enseñanza fueron de variada índole y evolucionaron con el régimen, reflejando la política de género de la autarquía al desarrollismo. Desde sus inicios desplegó su política editorial, así contaba con la colección Biblioteca la Mujer y el Hogar con 6 volúmenes editados en 1939. Estos libros eran: Ciencia

⁴⁰ La autora, Kathlenn Richmond, expresa que la deficitaria financiación no estaba relacionada con la precaria economía nacional, opina que «Franco explotaba la buena voluntad de la Sección Femenina y podía haber hecho más en apoyo de sus programas» (p. 184).

⁴¹ A. Morcillo Gómez, *En cuerpo y alma. Ser mujer en tiempos de Franco*, Madrid, Siglo XXI, 2015, p. 263.

⁴² M.J. Rebollo Espinosa, M. Núñez Gil, *Tradicionales, rebeldes, precursoras: instrucción y educación de las mujeres españolas a través de la prensa femenina (1900-1970)*, «Historia de la educación: Revista interuniversitaria», vol. 23, n. 26, 2007, p. 204.

Doméstica, La Mujer en la familia y en la sociedad, Puericultura del Hogar, Corte y Confección, Madres, La mujer y la educación de los niños. A partir de 1940 editó varios textos con el objetivo de instruir a las profesoras, a tal fin publicaron libros, programas, folletos y reglamentos. Publicaron los textos obligatorios para las alumnas de magisterio de centros públicos y privados, que previamente habían sido aprobados por el Ministerio de Educación, igual que sucedía con otros niveles de enseñanza. Unos textos que se fueron adaptando a los sucesivos planes de estudio y, por lo tanto, modificando contenidos oportunamente aunque fieles a su línea ideológica. Los catálogos de la Sección Femenina reproducían los listados de libros que previamente habían sido aprobados por el Ministerio a través del Consejo Nacional de Educación, después de su paso por la Junta de Censura. En buena parte de los libros la Sección Femenina figuraba como autora, en otras un equipo de asesores, incluso un equipo anónimo, y a veces aparecía la firma de autoras o autores. Los hombres también figuraban como asesores y como autores de libros destinados a niñas y mujeres. En su mayoría editados en Madrid, aunque hubo ediciones en otras provincias, como por ejemplo Barcelona, Bilbao, Salamanca o Valencia. Almena fue la editorial por excelencia de la Sección Femenina, a través de la cual la Regiduría de Prensa y Propaganda lanzaba sus publicaciones, que gozaban de una amplia difusión⁴³. Una editorial propia que publicaba sus libros de texto, diversos libros, programas, revistas, calendarios, agendas, folletos, cuestionarios y material audiovisual (tarjetas postales, discos, documentales y reportajes) que consideraba necesarios⁴⁴. En los catálogos de la Sección Femenina se recogen los listados de publicaciones, incluso en las revistas o en las guías catálogos que se presentaban en las ferias del libro a las que concurrían.

Las ediciones fueron creciendo, y en el transcurso del tiempo la nómina de libros se fue ampliando. El número de publicaciones creció de forma notoria. Desde la década de los años cuarenta hasta la década de los setenta del pasado siglo cuando se extinguió la Sección Femenina (1977). Las publicaciones constituían otra forma de difundir los postulados, establecer modelos y marcar los ideales. Tanto libros como revistas fueron vehículos de circulación de ideas y medios de inoculación de los idearios. Los libros eran fundamentales en la formación y eran textos obligatorios para la enseñanza. No obstante, el

⁴³ Se rotulaba Ediciones Almena de la Sección Femenina del Movimiento, y tenía el mismo domicilio social que la Sección Femenina. La Regiduría de Prensa y Propaganda informaba sobre las publicaciones en los Consejos Nacionales de la Sección Femenina. La difusión y venta de libros se realizaba en las dependencias propias de la Sección Femenina y también se vendían en librerías. Las ventas se realizaban por toda la geografía española, pero también a nivel internacional. La Regiduría Central del Servicio Exterior de la Sección Femenina enviaba los libros al extranjero. De esa manera los libros se distribuyeron en otros países europeos y en Hispanoamérica.

⁴⁴ Con anterioridad a la creación de la Editorial Almena la Sección Femenina figuraba con editora de sus obras, bien la Delegación Nacional o Delegaciones Provinciales así como las distintas Regidurías.

contenido de los libros estaba adaptando a la visión que le convenía al régimen, incluso manipulaba la información en aras de sus intereses. Los textos estaban infectados por la “visión católica conservadora” que predominaba en los contenidos⁴⁵. Desde los inicios del régimen, dado que los libros de las materias tenían un carácter sexista, reproducían los roles e imaginarios de las mujeres que contribuían a la construcción de identidades⁴⁶. Además las maestras y profesoras difundían y contribuían a su circulación, como transmisoras e intermediadoras.

La Sección Femenina disponía de diversas revistas y publicaciones para reconstruir modelos femeninos, con el objetivo de fabricar mujeres de acuerdo a su ideario, y consolidar el adoctrinamiento entre la población femenina. De manera que se convirtieron en instrumentos de adoctrinamiento y socialización nutrida de los valores tradicionales. Los valores con los que habían sido educadas para ser esposas, madres y servidoras de la patria⁴⁷. La cosmovisión de las mujeres, en inferioridad respecto a los hombres, se circunscribía al cuidado del hogar y de los hijos. Su vida pública se limitaba a comulgar y colaborar con los intereses del régimen. Si bien las publicaciones eran espejo de la sociedad, informaban movidas por sus intereses y a la vez deformaban la realidad, pero impusieron su modelo de mujer porque la población fue permeable a su discurso.

La prensa femenina, etiquetada de este modo porque era destinada a las mujeres y perseguían un efecto adoctrinador, como vía de transmisión de estereotipos femeninos. En este contexto se crearon una serie de revistas femeninas, cuyas páginas exponían el modelo de mujer que el nuevo régimen pretendía formar. No obstante, habría que considerar que retrataba a una mujer que no siempre se proyectaba en la realidad. Las revistas doctrinales insisten en la trascendente misión hogareña y en enseñarles el rol de esposas, madres y educadoras⁴⁸. Entre las publicaciones más destacadas citar las revistas Medina, Y, Consigna, Teresa y Escuela Hogar.

⁴⁵ A. Viñao Frago, *La recepción de Rousseau en la formación inicial del magisterio primario (España, siglo XX)*, «História da Educação», vol. 17, n. 41, 2013, p. 23.

⁴⁶ Falange Española Tradicionalista y de las JONS, *La Mujer en la familia y en la sociedad*, Ediciones Auxilio Social, 1939, p. 7.

⁴⁷ A. Pinilla García, *La mujer en la posguerra franquista a través de la Revista Medina (1940-1945)*, «Arenal: Revista de historia de mujeres», vol. 13, n. 1, 2006, p. 157.

⁴⁸ Rebollo Espinosa, Núñez Gil, *Tradicionales, rebeldes, precursoras: instrucción y educación de las mujeres españolas a través de la prensa femenina*, cit., p. 210.

3.1. *La cosmovisión de las revistas y sus paradigmas pedagógicos*

La revista «Medina» creada en 1941, se publicó cada semana hasta 1946, como guía para la mujer nacionalsindicalista⁴⁹. Reutilizaron el «viejo discurso» para perpetuarse arengando nuevos valores, insistiendo en el rol de las mujeres que necesita la patria. En el discurso fascista perviven los valores tradicionales, se mantienen permanencias que en la actualidad no han terminado de erradicarse. Las páginas de la revista están repletas de mensajes adoctrinadores referidos al ideal de feminidad⁵⁰. Se crea un modelo de mujer «desmovilizada» y «sometida al dictamen masculino en todos los niveles: desde la política a la familia, pasando por los consejos sobre el cuidado del hogar, la belleza y hasta por los consejos referentes a su vida sentimental»⁵¹. El falangismo potencia la obediencia, la abnegación y el sacrificio⁵². Incide en el ideal nacionalsindicalista pero también católico e implanta un código moral. Porque la conducta de las mujeres debía ser intachable. La propaganda y alabanzas al caudillo⁵³, la grandeza de la patria, las críticas al comunismo y liberalismo junto a los mensajes joseantonianos⁵⁴ completan los contenidos. Como refuerzo a la inferioridad se devalúa la inteligencia femenina⁵⁵. Las desventajas de la lectura va en sintonía con el prototipo, para las mujeres los libros son como adornos de estanterías⁵⁶ y solo se le recomiendan obras orientadas que refuercen su papel. Para las mujeres de clases altas y medias existía una preparación restringida con acceso a bienes culturales (museos, teatro), pero esa vida que proyecta la revista está alejada de la realidad de las mujeres de los sectores populares, incluso de la pésima situación económica cuando refiere a la economía doméstica. La revista Medina desvirtúa la realidad de la vida diaria de la mayoría de las españolas⁵⁷. La imagen idílica de la feminidad cargada de la simbología del fascismo, que se reconstruye y redefine por medio de referentes históricos para fijar un arquetipo «que insistía en la excelencia de algunas mujeres, dentro de un orden simbólico masculino y patriarcal»⁵⁸.

⁴⁹ *Destino de la mujer falangista*, «Medina», n. 1, 1941, p. 1.

⁵⁰ Pinilla García, *La mujer en la posguerra franquista a través de la Revista Medina*, cit., p. 158.

⁵¹ *Ibid.*, p. 158. M^a N. González Echeverría, *Tiempo de pasión de la Falange*, «Medina», n. 87, 1942, p. 15.

⁵² *Obediencia*, «Medina», n. 107, 1943. Rescata la máxima de San Pablo: «No es de las mujeres el enseñar, sino el ser enseñadas».

⁵³ Pinilla García, *La mujer en la posguerra franquista a través de la Revista Medina*, cit., p. 163.

⁵⁴ *José Antonio nos dijo*, «Medina», n. 153, 1944, p. 3.

⁵⁵ J. Juanes, *Ignorancia*, «Medina», n. 113, 1943, El mensaje del régimen es claro: «No nos parece mal este avatar que transforma a las inútiles damiselas encorsetadas en amables compañeras de investigación. Pero a nadie más que a ella es necesario un freno protector, que la detenga en el momento mismo en que una desahogada pasión por el estudio comience a restar a su feminidad magníficos encantos».

⁵⁶ Pinilla García, *La mujer en la posguerra franquista a través de la Revista Medina*, cit., p. 170.

⁵⁷ *Ibid.*, p. 177.

⁵⁸ A. Cenarro Lagunas, *La Falange es un modo de ser (mujer): discursos e identidades de género*

«Y. Revista de la Mujer Nacional Sindicalista» se publicó mensualmente entre 1938 y 1946, definida como «Revista de la Mujer nacional sindicalista». Se trataba de una publicación mensual que incluía contenidos referidos a la instrucción de las mujeres y de propaganda ideológica. Pilar Primo de Rivera estructura la formación en tres cuestiones básicas: 1) Formación nacionalsindicalista, 2) formación religiosa y 3) formación para la maternidad⁵⁹. Categorías que sirvieron de referente para diseñar los programas de los cursos que impartía la Sección Femenina. Se le consideraba de bajo nivel porque dedicaba parte de su espacio a la moda, la decoración y consultorio. Sin embargo, desde sus inicios incide en los mismos aspectos de la educación femenina que desarrollaban otras revistas. De tal manera que recalca los conceptos sobre la educación para la vida del hogar y la maternidad⁶⁰.

«Consigna. Revista Pedagógica de la Sección Femenina» fue una publicación semanal, muy longeva, que se mantuvo desde 1940 a 1977. La revista tenía carácter educativo y estaba destinada fundamentalmente a las maestras⁶¹. Aportaba una serie de orientaciones para las maestras⁶², destacando también la tarea de las maestras rurales. Consigna se editaba en formato libro y abordaba diversidad de contenidos enfocados a la educación, un elenco de temas desde religión, educación física, puericultura, trabajos manuales, cocina, teatro así como una sección fija de orientación pedagógica a cargo de la inspectora de Enseñanza Primaria y asesora pedagógica de la Sección Femenina, Francisca Bohigas. Entre sus páginas difundía el perfil de mujer acorde con el ideal patriótico y cristiano, marcado por el patrón androcéntrico y apologético⁶³. También subrayaba el papel de las mujeres en el hogar⁶⁴, el incuestionable espacio femenino. No obstante, esta publicación periódica se fue adaptando a la evolución del régimen de tal manera que se aprecian ciertos signos de modernidad, incluyendo los avances de la Ley General de Educación, acceso laboral de las mujeres, coeducación, la educación preescolar, al año internacional de la mujer, la discriminación⁶⁵. La revista se remitía “de forma gratuita” a todas las escuelas públicas españolas.

en las publicaciones de la Sección Femenina (1938-1945), «Historia y política: Ideas, procesos y movimientos sociales», n. 37, 2017, p. 106.

⁵⁹ P. Primo de Rivera, «Y», n. 30, 1940, p. 14.

⁶⁰ M. Mora, *Futuras madres*, «Y», n. 1, 1938, p. 17.

⁶¹ D. González, M. Ortiz, J. S. Pérez, *La Historia, lost in translation? Actas del XIII Congreso de la Asociación de Historia Contemporánea*, Ediciones de la Universidad de Castilla La Mancha, 2016, p. 508.

⁶² *Actualidad. Curso para maestras*, «Consigna», n. 8, 1941, p. 19. Una vez más deja patente el objetivo formativo y adoctrinador: «En las escuelas de formación siempre hay que tender a dar a la mujer una enseñanza que le sea útil, no solo para su capacitación cultural, sino para capacitarla individual, familiar y profesionalmente».

⁶³ F. Bohigas, *Tema XIII. La educación de la mujer*, «Consigna», vol. 3, n. 29, 1942.

⁶⁴ «Consigna», vol. 27, n. 297, 1966, p. 10.

⁶⁵ Rebollo Espinosa, Núñez Gil, *Tradicionales, rebeldes, precursoras: instrucción y educación de las mujeres españolas a través de la prensa femenina*, cit., p. 210.

La revista «Teresa. Revista para todas las Mujeres» era una publicación mensual «para todas las mujeres», que se mantuvo durante más de dos décadas (1954-1977)⁶⁶. Recogía contenidos variados, sobre todo de moda, política, cine y ciencia, prestando atención a los roles sexuados y la discriminación de las mujeres⁶⁷. Con un lenguaje didáctico y emocional proyectaba el discurso del modelo de mujer ideal, al tiempo que pretendía convertirlas en militantes se convirtió en una de las publicaciones más conocidas. La difusión ideológica y el credo religioso católico formaron parte de sus objetivos, consideraba a las mujeres católicas, apostólicas y romanas, y así se recogía en diversos números de la revista. La revista incidía en el programa de aprendizaje para la vida doméstica y la importancia de su trasmisión de los valores tradicionales porque «lo que se aprendía en el hogar» no se olvidaba. El formato evoluciona desde la política, la cultura a la moda, con reportajes y entrevistas a la vez que plantea otras profesiones para las mujeres⁶⁸.

Tanto las revistas «Consigna» como «Teresa» hicieron referencia a las cuestiones de actualidad como los cambios legislativos favorables a las mujeres, a la Ley General de Educación (1970), al I Congreso Internacional de la Mujer (1970) o al Año Internacional de la Mujer (1975). Añadir que publicaban artículos referidos al acceso laboral y a las problemáticas así como aportaban testimonios de las mujeres, incluso denunciaban discriminaciones en determinados ámbitos⁶⁹. Ofrecían desde la óptica educativa la perspectiva en clave de actualidad. Por ejemplo «Consigna» tiene una sección rotulada «Panorama femenino» resaltando cualidades de mujeres a nivel internacional, donde explicaba aspectos relevantes de las féminas citadas. Los cambios que se experimentaban en el país se proyectaron de forma un tanto sutil en los contenidos, aunque las variantes permiten ver un nuevo modelo de género⁷⁰. Ambas revistas pervivieron con las secciones ideológicas, doctrinales y hogareñas hasta que dejaron de publicarse en 1977.

La revista «Escuela Hogar», también dedicada al mundo femenino y por sus contenidos imprescindible para las amas de casa (cocina, moda, asuntos domésticos, decoración), fue primero una publicación mensual y después trimestral. Bastante ilustrada con láminas, figuras, dibujos, etc. Con variedad de labores, incluyendo los estilos de bordados tradicionales. Tuvo una vigencia de 23 años, pues se mantuvo entre 1954-1977.

⁶⁶ *El problema de hoy: feminismo y antifeminismo*, «Teresa», n. 1, 1954, p. 5.

⁶⁷ M. Martínez Romero, *La promoción de la mujer no consiste solo en trabajar fuera del hogar*, «Teresa», n. 189, 1969, pp. 48-49. En la revista se recomienda la lectura de la obra *La Mística de la Femenidad* de la autora Betty Friedam: «Es verdad que dicho estudio se refiere a las mujeres norteamericanas, pero en el fondo es perfectamente aplicable a nuestros propios problemas».

⁶⁸ *Es hora de elegir estudios. Profesiones femeninas al alcance de todas las mujeres*, «Teresa», n. 247, 1974, pp. 8-9.

⁶⁹ *¿Y usted qué opina? Desventajas de la mujer*, «Teresa», n. 183, 1969.

⁷⁰ M^a A. Casanova, *Salidas profesionales de cara a la nueva Ley*, «Consigna», n. 372, 1972, pp. 7-12.

Las tres revistas, «Consigna», «Teresa» y «Escuela Hogar», aunque fueron creadas y gestionadas en la etapa de la dictadura respondiendo a su ideal de feminidad, se mantuvieron y circularon hasta el agotamiento del régimen, dado que fueron introduciendo algunos avances⁷¹. Con la transición a la democracia, en el año 1977 fue la fecha en la que se liquidó la institución falangista de la Sección Femenina. En la editorial del último número publicado contenía un escrito dirigido a la fundadora de la Sección Femenina anunciaba el final de la publicación en base a lo estipulado en el Real Decreto Ley 20/1977 del 18 de marzo⁷².

Las mencionadas revistas estaban dirigidas a las mujeres, pero la Sección Femenina también editó revistas destinadas a las niñas y a las adolescentes, como por ejemplo la revista *Bazar* que circuló entre 1947 y 1977⁷³. En todas las publicaciones, además del adoctrinamiento ideológico, a través de los contenidos de sus páginas, se asomaban las relaciones de género propias de esas décadas. El ideal de feminidad se persiguió desde la escolaridad y para ello era imprescindible formar a las maestras, que eran modelos de mujer a imitar y a la vez desplegaban sus enseñanzas en las escuelas de la geografía hispana.

Las maestras tenían que seguir los textos y folletos con los contenidos que publicaba la Sección Femenina así como las orientaciones de la revista «Consigna», que tenía carácter pedagógico y constituían una vía de contacto con el magisterio. En el caso de los maestros, las orientaciones las publicaba la revista «Vida Escolar» una destacada y práctica revista educativa que llegaba puntualmente a todas las escuelas. Se trata de una revista publicada por el Centro de Documentación y Orientación Didáctica de Enseñanza Primaria (CEDODEP creado en 1957, con Adolfo Maíllo como primer director) que daba a conocer algunas innovaciones metodológicas, a la vez que se constituye en el mejor vehículo para transmitir la nueva visión de la enseñanza que incorporaba los nuevos modos curriculares. Entre sus contenidos se hallaban guías didácticas de las distintas áreas del currículo, difusión de innovaciones metodológicas, artículos de opinión, artículos de divulgación de experiencias, temas de interés en el momento, conferencias, congresos, etc. Marcó un referente en la innovación pedagógica y se convirtió en el órgano de expresión y experiencia entre las escuelas españolas.

⁷¹ Rebollo Espinosa, Núñez Gil, *Tradicionalistas, rebeldes, precursoras: instrucción y educación de las mujeres españolas a través de la prensa femenina*, cit., p. 212.

⁷² *Carta abierta a Pilar Primo de Rivera*, «Consigna», n. 422, 1977, p. 1. En la referida carta se lamentaban del final en los términos siguientes: «Y por eso ahora es triste que la frialdad de un decreto ley disponga que dejes de ser la delegada nacional de la Sección Femenina porque se ha dispuesto que el Movimiento, es decir la Secretaría General de ese Movimiento, no tiene ya vigencia en el momento actual».

⁷³ F.J. Martínez, J.M. Alfonso, «*Tardes de enseñanza y parroquia: el adoctrinamiento de las niñas en la España franquista a través de las revistas Bazar y Tin Tan (1947-1957)*», «El futuro del pasado», n. 14, 2013, p. 230.

4. *Redefinición de modelos educativos para el magisterio femenino*

El férreo control ideológico, el fuerte adoctrinamiento, el sometimiento a los aparatos ideológicos de la Falange y la iglesia, además de la adhesión a los principios del nacional catolicismo y valores religioso morales caracterizaron al magisterio, hecho que se proyectó en la educación de las nuevas generaciones de españolas. Se aplicaba una pedagogía diferencial atendiendo a los dos sexos por separado, en donde la función del maestro y la función de la maestra se orientaban a las actividades propias para cada sexo. Toda la diferenciación pedagógica contribuyó a conformar modelos de hombre sugeridos al maestro y modelos de mujer sugeridos a las maestras. La imagen que proyectaban tanto maestros como maestras eran ejemplos a imitar respectivamente por niños y niñas escolarizados. Esa distinción repercutía en su función social y en la configuración de dos escuelas distintas. La preparación diferenciada entre maestros y maestras, imprescindible para atender a los roles fijados en la sociedad española del momento, se reproducía en las escuelas distinguiendo entre niños y niñas⁷⁴.

En la circular de 5 de marzo de 1938 (BOE 8 de marzo), el Director de Primera Enseñanza, Romualdo de Toledo, expresaba que la educación patriótica, educación cívica, educación religiosa y educación física eran los cuatro pilares sobre los que tenía que asentarse la formación del magisterio, generando un nuevo modelo pedagógico. De manera que la formación del magisterio se definió por una enseñanza de marcado carácter patriótico, sexista y segregada. El programa de educación sexista y dedicado al hogar se consolidó durante el franquismo y estaba presente en la formación de maestras.

La Jefatura del Estado por Ley de 28 de diciembre de 1939 (BOE de 29 de diciembre) encomendó tareas educativas a la Sección Femenina de la FET y de las JONS. La delegada nacional Pilar Primo de Rivera, hermana del fundador de la Falange, regía la institución que, a nivel administrativo, dependía de la Secretaría General del Movimiento. Esta institución atendió la educación en todos los niveles educativos (enseñanza primaria, enseñanza secundaria, estudios de magisterio, enseñanzas profesionales, educación no formal, etc.). Tenía asignada la educación integral de las mujeres, además de transmitir el modelo ideológico para preservar los valores del régimen. El perfil femenino se sustentaba en arquetipo tradicional que condicionaba la función social de mujer hogareña y desplazaba a las mujeres progresistas del primer tercio del siglo XX⁷⁵. La educación a través de los saberes tradicionales preparaba a

⁷⁴ Mahamud, *Mother Nature at the service of the fatherland. Scientific knowledge in primary education reading books during the Franco dictatorship*, cit.; A. G. Morcillo, *El género en lo imaginario: El «ideal católico femenino» y estereotipos sexuados bajo el franquismo*, en M. Nash (ed.), *Represión, resistencias, memoria: las mujeres bajo la dictadura franquista*, Granada, Comares, 2013, pp. 71-93.

⁷⁵ Moreno Seco, *Mujer y culturas políticas en el franquismo y el antifranquismo*, cit.

las mujeres para la vida del hogar e idealizaba la imagen de las mujeres. Una representación que se proyectó en la idealización de las mujeres en la idílica vida privada. Imágenes y representaciones que nos ha legado la historia de la educación de las mujeres. Además este perfil también se sustentaba en otros lugares del planeta⁷⁶.

La Sección Femenina se encargó de diseñar un currículo para la formación de las maestras acorde con el modelo de mujer falangista. En la educación para las mujeres se significó en el desarrollo del prototipo femenino que precisaba la España de entonces. Tenía competencias en varias materias, consideradas importantes en su proceso de aprendizaje y preparación docente. Entre ellas indicar la Educación Física, la Formación del Espíritu Nacional o Formación Política y la «macro materia» de Labores, que encuadraba otros saberes como la economía doméstica, puericultura, corte y confección, manualidades, etc. Como organismo afín al régimen franquista exaltó el patriotismo y la religiosidad a la vez que fomentó la pedagogía y técnicas de educación física⁷⁷. El estrecho vínculo de la educación de las mujeres con la concepción cristiana era manifiesto en el pensamiento de muchas figuras, entre ellas la maestra e inspectora Francisca Montilla⁷⁸ que alude que la educación física debe mantenerse en los límites de la moral cristiana. También la profesora Consuelo Sánchez Buchón⁷⁹ incidía en la moral con referencia a la encíclica de Pío XI. Por su parte la maestra Josefina Álvarez opinaba que había que fomentar juegos, gimnasia rítmica y cantos, así como canciones y folklore regional en sintonía con las estaciones⁸⁰. El folklore se relacionaba con la identidad de la España nacional y patriótica. Para el folklore regional recomendaba el intercambio entre las diferentes zonas geográficas así como entre las escuelas de las áreas rurales y las áreas urbanas⁸¹. Con anterioridad y en la misma sintonía, Rufino Blanco (1930) refiere a la importancia de la educación física femenina, un alto valor para la patria porque la preparación física del cuerpo de la mujer se considera «un don precioso para la patria y para el destino de los pueblos»⁸². El objetivo era preparar a las

⁷⁶ D. Russi Frasquete, I. Guilherme Simili, *A moda e as mulheres: as práticas de costura e o Trabalho feminino no brasil nos anos 1950 e 1960*, «História da Educação», vol. 21, n. 53, 2017, pp. 267-283.

⁷⁷ Ramos Zamora, *Maestras represaliadas por el gobierno franquista*, cit., p. 123.

⁷⁸ F. Montilla, *La educación y su historia*, Madrid, Imprenta Casa Martín, 1952, p. 108.

⁷⁹ C. Sánchez Buchón, *Pedagogía*, Bilbao, Ed. Padre Poveda, 1955, pp. 204-205.

⁸⁰ J. Álvarez, *Comentarios a la circular de 5 de marzo de 1938*, «Atenas», nn. 91-92, 1939, pp. 220-221. Por tal motivo Josefina Álvarez (p. 220) recomendaba: «Que las canciones de cuna y villancicos se canten en Navidad; las de vendimia y sementeras en las estaciones oportunas; las de las flores en mayo; las canciones del Rosario en octubre...».

⁸¹ *Ibid.*, p. 220. La referida maestra resaltaba el valor del folklore en la educación: «*Establézcase el intercambio entre las escuelas de campo y de ciudad, y de regiones diferentes, que España guarda en su entraña riquezas sobradas para bastarse a sí misma sin recurrir a la servil copla, signo de decadencia*».

⁸² R. Blanco y Sánchez, *Enciclopedia pedagógica*, Madrid, Hernando, 1930, p. 806.

maestras, que a su vez instruirían a las niñas, en todas sus facetas para cumplir su misión en el hogar y la familia.

El gobierno restringió y abarató la preparación inicial del magisterio, pues las condiciones del país tras la guerra no eran buenas y había que cubrir puestos docentes. Aunque la auténtica motivación era de carácter ideológico se afanó en diferenciar el aprendizaje en función del sexo, con una organización de la enseñanza segregada, separando espacios y contenidos para formar maestras que a su vez serían las educadoras de las niñas, futuras mujeres. En esta etapa se incrementó la matrícula femenina y descendió la masculina, dadas las bajas retribuciones salariales y la pérdida de prestigio profesional del magisterio, a pesar del papel adoctrinador.

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 planes de Estudio de Magisterio de 1942, 1945, 1950 y 1967 presentaban un programa con materias diferenciadas según se tratara de aspirantes a maestras o maestros. El Plan de 1971, a tenor de la Ley General de Educación (1970) unifica el programa educativo para ambos sexos, aunque se mantenían los sesgos de género. Este Plan de Estudios constituye la excepción del periodo indicado. En el tardo franquista comenzó a darse muestras de ciertos cambios y apertura del régimen al ampliar la edad escolar obligatoria con la Ley General de Educación (1970). De manera que las niñas podían permanecer en los centros hasta los catorce años así como la posibilidad de acceder a otros niveles educativos, y no solo dedicarse a la ayuda familiar.

5. Programas académicos con sesgos de género

La feminidad se remarcaba a través de los programas educativos y de los contenidos de determinadas materias, con un currículum sexista y segregado. Además del adoctrinamiento, el patrón ideológico dirigido a la feminidad fomentaba la maternidad, la vida hogareña y la religiosidad. La identidad femenina se reforzaba a través de la formulación de contenidos, prácticas y espacios específicos para las mujeres. Las leyes educativas fijaban criterios para los aspirantes al magisterio «ser persona de vocación clara, de ejemplar conducta moral y social» hecho que implicaba demostrar con certificados de buena conducta, expedidos por el párroco y de la guardia civil. Durante todo el periodo franquista se produjo una clara diferenciación del currículo por

cuestión de género. Las diferencias curriculares marcaron la formación de las maestras⁸³.

La formación de la mujer como madre y ama de casa continuó siendo la tónica general de la formación de las maestras durante el franquismo y hacia ese modelo educativo se dirigieron los programas de estudio para las maestras promulgados durante ese periodo⁸⁴.

Al margen de los contenidos sexuados en Pedagogía, Religión y Formación política, las Enseñanzas del Hogar o enseñanzas de carácter doméstico incluían una amplia gama de contenidos. Se consideraban materias básicas en la formación de las maestras, por su aplicación en las escuelas para preparar a las niñas como pequeñas mujercitas. No obstante, otras materias del currículo formativo presentaban una formulación explícita de contenidos sexistas, con primacía de los conocimientos masculinos e invisibilidad de lo femenino, como por ejemplo, la Historia. Los manuales escolares o libros de texto resultaron fundamentales en la práctica del aula, reforzaban contenidos a la vez que reproducían roles. Las aplicaciones didácticas y pedagógicas con la intencionalidad de los libros de texto eran utilizadas en el proceso de enseñanza y aprendizaje de las maestras. Los programas de estudio fueron el escenario clave para el uso didáctico, para la formación y adoctrinamiento de las actitudes que se esforzaron en alentar a las estudiantes. Posteriormente, como profesionales, las maestras serían las trasmisoras de esta ideología.

5.1. *Las Enseñanzas del Hogar*

Desde la infancia había que instruir a las nuevas generaciones, aleccionándolas en los menesteres domésticos, tan importantes en la vida cotidiana, por su contribución a la estabilidad del orden social. Las disciplinas capacitaban como amas de casa y respondían a los objetivos que el régimen había prescrito para las mujeres. Las competencias para el hogar se adquirirían a través de la educación, se les implica en las responsabilidades de la vida familiar y en el apego al hogar. Tanto las tareas domésticas, como el cuidado de la familia eran inherentes a la condición femenina. Una ocupación u oficio en exclusiva, a tiempo completo, para las mujeres que se desarrolla en el ámbito privado e invisible. Se revalorizaba la función tradicional de las mujeres, potenciando la vida privada como amas de casa, esposas y madres. En la formación de las maestras se reforzaron estos roles y mensajes. Las Enseñanzas del Hogar eran

⁸³ M. Carreño, T. Rabazas Romero, *Sobre el trabajo de ama de casa. Reflexiones a partir del análisis de manuales de Economía doméstica*, «Revista Complutense de Educación», vol. 21, n. 1, 2010, p. 67.

⁸⁴ *Ibid.*, p. 68.

una materia obligatoria para las alumnas, que figura en todos los planes de estudio de magisterio, excepto en el plan de 1971. Mientras los alumnos no tenían que cursarla. De manera que «Se enseñó y se aprendió para lograr el bienestar de los otros». Dentro de los contenidos de estas enseñanzas, también se le concedió importancia a la materia de Economía doméstica⁸⁵.

El Plan Bachiller (1940) un programa transitorio articulado en dos cuatrimestres que habilitaba a los titulados en bachiller con la denominada «dispensa de escolaridad», diferenció la formación del magisterio. De manera que en el segundo cuatrimestre incluía las materias de Corte de vestidos, Labores artísticas y Economía doméstica. En el plan provisional (1942) la materia de Hogar figuraba en los cuatro años académicos: Labores y Enseñanzas del Hogar en 1º y 2º curso; Labores en 3º; y en 4º Labores Artísticas y Enseñanza del Hogar. En el Plan de Estudios de 1945, la asignatura de Labores se incluía en 1º y 2º, y en 3º Enseñanzas del Hogar e iniciación profesional para alumnas. En el Plan de Estudios de 1950 fijó en 1º curso: Labores; Enseñanzas del hogar y su metodología. En 2º Labores y Enseñanzas del hogar. En 3º Enseñanzas del hogar. En el Plan de Estudios de 1967 tenía igualmente asignaturas diferenciadas como Manualizaciones y Enseñanzas del Hogar en 1º y 2º curso. Con la Ley General de Educación (1970) y el Plan de Estudios de 1971 desaparecieron del currículo pero siguieron adscritas al mundo femenino.

5.2. *La Formación Patriótica*

A través de la denominada Formación del Espíritu Nacional, los pensadores del Franquismo pretendían convertir en dóciles y perfectas españolas según los principios inspiradores del Movimiento Nacional. La Formación del Espíritu Nacional era otra de las materias básicas en la formación inicial del magisterio femenino, que impartía personal de la Sección Femenina. Una materia obligatoria a través de la que dibujaban el prototipo de mujeres que necesitaba España. Por el Decreto de 29 de marzo de 1944 (BOE 10 de abril de 1944) se estableció como materia obligatoria en los tres primeros cursos de todas las carreras universitarias. De manera que la asignatura de Formación del Espíritu Nacional estaba orientada a conocer los principios del Movimiento Nacional que componían el ideario franquista. Esta asignatura, en la que se recordaba el Fuero de los Españoles, compendio de la ideología franquista era desigualdad para hombres y mujeres. Añadir que durante el desarrollo de los estudios de

⁸⁵ Miriam Carreño y Teresa Rabazas escriben al respecto que «Los planes de estudio para las maestras constituyeron el marco imprescindible en el que se desarrollaron estos manuales. La obligatoriedad del aprendizaje de las enseñanzas específicas para las mujeres, les dieron vida y les concedieron autoridad (*ibid.*)».

bachiller, las mujeres eran preparadas para el matrimonio con clases de cocina y costura, siendo excepcional su acceso a estudios universitarios; y las que optaban por conseguir un trabajo estaban obligadas previamente a realizar el llamado Servicio Social.

Esta materia diferenciada estuvo presente en todos los planes de estudio de magisterio, aunque con algunas variantes curriculares y de forma obligatoria, hasta el fallecimiento del dictador. Se canalizó a través de un abanico de rótulos aunque siempre fiel a sus contenidos de la materia. En el Plan Provisional de 1942 la materia se impartía en 1º curso y se denominaba Enseñanza Patriótica, mientras en 2º curso se llamaba Historia y Educación Patriótica. En el Plan de 1945 se rotulaba Formación del Espíritu Nacional se impartía en 3º curso. En el Plan 1950 se denominaba Formación Político-Social estando presente en tres cursos de la carrera. En el Plan de 1967, caracterizado por las metodologías didácticas se rotuló, Didáctica de la Formación del Espíritu Nacional cursándose en 1º y 2º año. En el Plan 1971 se denominaba Política y se impartía en el primer año.

5.3. *La Educación Física*

La Educación Física, desde los inicios de la contienda, fue gestionada y regulada por la Sección Femenina, quien la convirtió en una enseñanza obligatoria en todos los niveles educativos. De manera que fue otra de las materias segregadas que ocupó un espacio académico importante en los estudios del magisterio⁸⁶. Las características biológicas estaban estrechamente unidas al rol social, determinando ejercicios propios para las mujeres y otros ejercicios físicos exclusivos de los hombres. En definitiva, la educación física reflejaba la biologización de la moral femenina y masculina. El cuerpo era tratado de acuerdo con el sexo biológico, de manera que las características biológicas prescriben las prácticas corporales. La percepción diferenciada del cuerpo femenino hacía que la educación física fuera específica y acorde con el rol social. La construcción del cuerpo femenino viene determinada por la maternidad. Las jóvenes que se extralimitaban con los ejercicios físicos eran censuradas, porque no correspondía a su condición de mujer ni con su misión. Tanto la Falange masculina como la Falange femenina se encargaron de diseñar esta materia que se encontraba profundamente ideologizada⁸⁷. Los argumentos tradicionales

⁸⁶ M. Vidal Barbier, M. Vidal Almiñana, *Tendencias del pasado, presente y futuro de la Educación Física en España*, «Revista Española de Educación Física y Deportes», 2008, p. 110.

⁸⁷ *Ibid.*, p. 111; F.J. Martín Recio, *Origen y evolución de los contenidos en Educación Física y su relación con los estilos de enseñanza*, «Revista Digital Innovación y Experiencias Educativas», 2009, pp. 1-15.

prevalecían igualmente en la educación física. La dicotomía de los contenidos y las prácticas educativas correspondían a la creencia de que las mujeres eran inferiores a los hombres tanto a nivel físico como intelectual, considerándolas responsables de la transmisión de valores ideológicos y patrióticos en relación con su papel de madres⁸⁸. La moralidad y las restricciones en orden al tipo de actividades físicas en relación a los estereotipos de género condicionaban la educación física a su rol social⁸⁹.

La Sección Femenina era la responsable de la elaboración de los programas de Educación Física. Era una materia obligatoria que evoluciona junto al currículo formativo. Sus enseñanzas estaban a cargo del personal instruido por la Sección Femenina nombrado al efecto para desempeñar la docencia. Los planes de estudio de magisterio incluyen la formación física diferenciada. Se seleccionaba el tipo de actividad y ejercicios a realizar, pero se prohibía determinados deportes por considerarlos no aptos para las mujeres. Los programas didácticos se orientaban a hacer más femeninas a las mujeres, evitar su masculinización y contribuir a su preparación física en función de su futura maternidad. De manera que la educación física tenía connotaciones fisiológicas e higienistas. Es decir que presentaba un sentido biológico “utilitario” y respondía a esquemas ideológicos. En cambio la educación física para los alumnos pretendía «formar una juventud fuerte, sana, disciplinada» y una preparación «para la superior formación intelectual o para la vida profesional del trabajo en la industria y el comercio o en las actividades agrícolas». Para las alumnas concretaba que se las capacitaría específicamente «para la vida del hogar, artesanía e industrias domésticas»⁹⁰.

El programa curricular evoluciona en los distintos planes de estudio de acuerdo con el momento político. Para el caso de las mujeres la educación física en el primer franquismo tenía carácter científico «biomédico, fisiologista» y en el segundo tenía una orientación «técnico-higienista» con el objetivo profesional⁹¹. Su rótulo se modifica en los distintos planes de estudio: Gimnasia y Recreos dirigidos (plan 1942), Educación Física y Deportes (plan 1950), Educación Física (plan 1967 y 1971). En el Plan de 1942 la disciplina se denominó Gimnasia y Recreos dirigidos. En 2º curso se desdobra constituyendo dos asignaturas independientes, Gimnasia y Recreos dirigidos. Con la Ley de Enseñanza Primaria de 1945, la materia se llama Educación Física y Deportes, que se impartirá en cada uno de los tres años de la carrera. A partir de 1950, con la aprobación del Reglamento de las Escuelas de Magisterio la materia Educación Física y su Metodología se incluye en los tres años de la carrera. La

⁸⁸ J.C. Manrique Arribas, *La Educación Física Femenina y el ideal de mujer en la etapa franquista*, «Revista internacional de Medicina y Actividad Física y del Deporte», 2003, p. 91.

⁸⁹ *Ibid.*, p. 93.

⁹⁰ Ley de Enseñanza Primaria de 17 de julio de 1945, «BOE», n. 189, pp. 387-388.

⁹¹ T. Rabazas Romero, *La educación física del Magisterio femenino en el Franquismo*, «Revista complutense de educación», vol. 11, n. 2, 2000, p. 194.

politización del programa se mantiene hasta la década de los años sesenta. A medida que evoluciona el perfil del magisterio y se produce cierta apertura los contenidos se diversifican y se amplían en sentido pedagógico⁹². Con el plan de 1967 la materia se denomina Educación Física y se impartirá en los dos años de la carrera. En el Plan de 1971 también se denomina Educación Física y se incluye en cada uno de los tres cursos de la diplomatura. Además introducía algunas actividades deportivas en las que podían participar las alumnas, tales como el baloncesto, balón mano y balón volea. Si bien se había establecido la enseñanza mixta las clases eran separadas por sexos. Los alumnos recibían la formación con un profesor y una formación específica para los varones.

Las actividades mantenían la separación de sexos igual que el personal instructor encargado de ello (art.14 de la ley de enseñanza primaria de 21 de diciembre de 1965. BOE de 23 de diciembre). El Ministerio de Educación Nacional fijará, de acuerdo con las Delegaciones Nacionales de Juventudes y Sección Femenina, los cursos de capacitación en las «actividades juveniles de tiempo libre» que habrán de realizar las alumnas y los alumnos para la obtención del título de Maestro. La idea de la Sección Femenina era no masculinizar a las mujeres y por tal motivo no consideraba el deporte al estilo masculino⁹³. El interés del régimen por promover la Educación Física queda patente con la promulgación de la Ley de Educación Física de 1961, por la que se establecía como asignatura obligatoria en todos los niveles educativos. Por primera vez en la historia de la educación española, algunos contenidos relacionados con la Expresión Corporal, se incluyen en la formación de profesores de Educación Física y en su programa educativo⁹⁴.

La Orden Ministerial de 1 de julio de 1967 y el Decreto 193 del 2 de febrero de 1967 reestructuraron estos estudios y estableció como requisito de acceso poseer el título de bachiller superior para poder ingresar en las escuelas de magisterio. El rango del magisterio continuó siendo de carácter profesional, pero los requisitos de acceso aumentaron. El plan de 1967 resultó un plan de estudios breve en el tiempo a juzgar por su vigencia. Tres años más tarde una nueva regulación modificó la estructura del magisterio. Mantuvo la separación de sexos en la Educación Física igual que lo haría posteriormente el Plan 1971.

⁹² Ley 169/1965, de 21 de diciembre, sobre reforma de la Enseñanza Primaria, «BOE», n. 306, 23 de diciembre de 1965. Título V. Artículo 56. El Maestro: «Ha de ser persona de vocación clara, de ejemplar conducta moral y social y ha de poseer la preparación profesional competente y el título que le acredite legalmente para el ejercicio de su profesión».

⁹³ Manrique Arribas, *La Educación Física Femenina y el ideal de mujer en la etapa franquista*, cit., p. 96.

⁹⁴ J. Coterón, J. Gil, *La Expresión Corporal en los estudios de Ciencias de la Actividad Física y del Deporte*, en G. Sánchez, J. Coterón (edd.), *La Expresión Corporal en la Enseñanza Universitaria*, Salamanca, Ed. Universidad de Salamanca, 2012, pp. 43-58.

5.4. *La Educación Religiosa*

La Religión fue otra materia curricular obligatoria en todos los niveles educativos, y a la vez, una materia marcadamente sexista que se encontraba insertada en los diferentes planes de estudio⁹⁵. De la misma manera que otras materias, también su programa académico estaba mediatizado por los valores ideológicos del nacionalcatolicismo. La sacralización afectó a los asuntos públicos y a las instituciones educativas españolas. El modelo de mujer alentado por el franquismo presentaba un alto contenido católico que penetraba en todas las facetas de su vida. Los códigos morales regían el comportamiento de las españolas y proyectaban el ideal de feminidad en la virgen María. Además las mujeres eran garantes de la transmisión del credo y prácticas católicas en el seno de la familia. La religión católica como Religión de Estado (BOE, 17 de julio de 1945, artículo 6 del Fuero de los Españoles de 17 de julio) estaba enaltecida por el gobierno español confesional, no tenía cabida otro credo y se imponía en la educación. El núcleo de la asignatura se centraba en el la historia sagrada, catecismo, los sacramentos y la liturgia. En la vida extraescolar había que practicar la fe y los sacramentos participando de la liturgia católica de forma obligatoria. Todo se circunscribía a la religión y a la vida moral católica. Las enseñanzas eran impartidas por las maestras en las escuelas y cuidaban del cumplimiento de la moral. Recibían visitas puntuales del cura párroco quien comprobaba el aprendizaje de las niñas. En los estudios de Magisterio el responsable de la enseñanza era un sacerdote, igual que en el bachillerato y en la universidad. La religión se mantuvo hasta la desaparición del régimen y los principios nacional católicos inspiraron la educación española hasta la liquidación del régimen, incluso impregnando a LGE⁹⁶.

La tecnocracia representó un cambio de modelo educativo en aras de las necesidades económicas y sociales. Se transforman y evolucionan los contenidos curriculares y se amplían las expectativas de las mujeres, del rol tradicional al rol profesional. El magisterio continúa siendo una pieza clave, si bien, se desligan en cierta medida de la formación ideológica. Las maestras serán partícipes de esos cambios y en base a ello se diseña su preparación inicial, que refleja «una mayor preocupación por cuestiones pedagógicas y didácticas»⁹⁷. La modernización del sistema educativo impulsado por la tecnocracia plasmada en la Ley General

⁹⁵ A.M^a, Badanelli Rubio, *Representing two worlds: illustrations in Spanish textbooks for the teaching of religion and object lessons (1900-1970)*, «History of Education», vol. 41, n. 3, 2012, pp. 303-338; Ead., *The preservation of heritage: children's writings and school textbook research*, «History of Education & Children's Literature», vol. 7, n. 2, 2012, pp. 119-138.

⁹⁶ M. de Puelles Benítez, *Religión y escuela pública en nuestra historia: antecedentes y procesos*, «Bordón. Revista de pedagogía», vol. 58, nn. 4-5, 2006, p. 527.

⁹⁷ T. Rabazas Romero, *El currículo femenino de las maestras a través de los libros de texto (1938-1970)*, en S. San Román Gago, *La maestra en el proceso de cambio social de transición democrática. Espacios histórico-generacionales*, Madrid, Instituto de la Mujer (Ministerio de Trabajo y Asuntos Sociales), 2002, p. 175.

de Educación, en consonancia con los avances tecnológicos y la evolución que experimentaba la sociedad suprimió las materias específicas para las alumnas de los programas educativos. El Plan de Estudios de 1971 unificó el currículo de maestros y maestras, y por ende de la enseñanza primaria y la secundaria. Sin embargo, la desaparición de las materias sexistas no liberó de sus funciones domésticas a las mujeres, si bien mantuvo los roles diferenciados.

De todas formas, bajo las nuevas condiciones establecidas para el desarrollo educativo, con la seducción de la tecnocracia, se fueron abriendo espacios y algunas maestras modificaron sus comportamientos y rompieron con el apego a su rol tradicional. Sin embargo, lo más común fue mantener el modelo conservador sin desarrollar la conciencia reivindicativa. No se duda de que hubo cambios ideológicos junto a la evolución económica y social que experimentaba el país. El gobierno de los tecnócratas reflejó cambios que se proyectaron, en cierta medida, en los modelos educativos y de género, con cierta modernización de las costumbres y apertura social con el acceso de las mujeres al trabajo y a la educación, incrementándose las matrículas en los estudios de magisterio, bachillerato y universitarios.

A modo de conclusión

La historia ha evidenciado que los regímenes dictatoriales reescribieron un discurso para las mujeres, erigiéndolas en pieza clave para la construcción de la nación. La identidad de género dependía de la cultura política y de la transformación del espacio privado y público que se le asignaba. Desaprender y reaprender en clave de género fue un proceso que experimentaron generaciones de españolas y de españoles de la posguerra, que habían recibido una educación basada en principios democráticos. La imposición de la dictadura franquista significó la consolidación de un modelo de mujer que, mediante la combinación de elementos católicos y falangistas, se convirtió en la base legitimadora del nuevo régimen que las subordinaba y relegaba a un segundo plano. Así las relaciones de género derivaron de los modos en que se asignaban funciones y responsabilidades distintas a mujeres y a hombres. Sus implicaciones en la vida cotidiana fueron múltiples y se manifestaron en la división del trabajo (doméstico y extra-doméstico), en las responsabilidades familiares, en el campo de la educación, etc. La construcción de las masculinidades en el franquismo permitió apropiarse de nuevos modelos de identidad de género desde la experiencia de los varones y del concepto de «ser hombre». En cambio «ser mujer» significó el retorno al hogar impulsado desde las esferas políticas, conformando modelos de mujeres dóciles, sumisas y subordinadas al marido. La agenda de la población masculina difería de la femenina, porque los roles adjudicados les reservaba esferas distintas. No solo se trataba de

espacios sino de derechos y supremacía de un sexo frente al otro, porque la ideología del régimen tuvo una clara repercusión en el entramado social. Las mujeres perdieron los derechos alcanzados durante la segunda república, produciéndose un importante retroceso en el proceso de emancipación. Como sujetos desiguales a los hombres se las excluyó totalmente de la ciudadanía. En esta nueva configuración de la identidad femenina, en la que se glorificaba la maternidad, a las mujeres se les prohibió el acceso al ámbito público y, por lo tanto, al espacio de la política, considerado como un espacio masculino.

La mujer hogareña, inspirada en la doctrina católica, se convirtió en el prototipo ideal según los planteamientos falangistas. Según el nacionalcatolicismo, el ideal femenino era el de la mujer sumisa, hija, esposa o madre, condenadas a la domesticidad, relegadas al ámbito privado del hogar, a la familia y a las tareas de cuidados. Dentro de la lógica de las relaciones de género impuestas por el franquismo, ellas asumieron las tareas dentro del hogar y cumplieron con los encargos que la feminidad franquista les impuso. Aquellas mujeres que no acataban el orden moral, desafiaban los roles y espacios asignados por la ideología franquista, eran repudiadas y estigmatizadas porque transgredían el orden establecido. Sin embargo, esta represión sistemática no anuló totalmente la capacidad de supervivencia y de resistencia femenina. La Sección Femenina a través de los discursos, la propaganda, las publicaciones y la educación fue un medio eficaz para extender el proyecto socializador.

Igualmente, la formación del magisterio seguía la senda marcada por la dictadura. Tal como hemos indicado, el discurso ideológico, basado en los roles tradicionales, sustentó las diferencias de género, construidas en función de los intereses políticos, con unos criterios confeccionados a su medida. La práctica pedagógica, en los centros de formación, estaba marcada por el desarrollo curricular de género y sujeta al control institucional ideológico que activó las creencias, los comportamientos y estereotipos vinculados a los intereses franquistas, a través de la reproducción del discurso hegemónico. Es decir, se amparaba en las atribuciones de género diferenciadas, con la sumisión de las mujeres a la autoridad masculina. De ahí la imposición de un currículum en la enseñanza marcado por la religión, la domesticidad y maternidad, la historia patria y la exaltación de valores morales, para la posterior transmisión del patrón vigente a las nuevas generaciones. Se trataba de fortalecer la reeducación de las mujeres desde los parámetros de la vida en el hogar y la subordinación al marido. Las maestras, desde la formación inicial al ejercicio profesional, continuaron el discurso ideológico y consolidaron el ideal de feminidad. Ellas hicieron explícito su compromiso político, se visibilizaron como modelos de mujer y se comportaron como agentes activas de ese ideal alejadas de planteamientos feministas, con la única adhesión a la Sección Femenina. Las aprendizas de maestras asumieron los roles de género, en base a las creencias y saberes políticamente correctos sobre lo femenino y lo masculino. A partir de los años finales de la década de los sesenta comenzó la modernización educativa

y la incorporación de innovaciones en metodologías. Si bien, en la encrucijada final de la dictadura con evidentes síntomas de agotamiento del régimen, como novedad las maestras ya no aprendían ni impartían las Enseñanzas del Hogar pero se mantenía el filtro ideológico.

El control sobre el magisterio femenino afectaba incluso a las formas de vida, la reducción a la vida privada y a la subordinación al orden patriarcal. La presencia del magisterio femenino constituyó un pilar fundamental para el franquismo, porque ocupaba un espacio clave para el aprendizaje de los ideales de la feminidad que le convenía al régimen dictatorial, alejado de vindicaciones. Las maestras eran modelos intachables de mujer, las cuales con una conducta ejemplar transmitían los valores del régimen. Desde los inicios se implican en el proceso de resocialización de las niñas y mujeres, pues la aprehensión de los roles de género, se produce precisamente dentro del proceso de socialización en el sistema escolar. A través de la educación contribuyen a reforzar actitudes y comportamientos, de acuerdo con el discurso dominante, en consonancia con los principios ideológicos del movimiento nacional y la iglesia católica. Es decir, los principios morales, religiosos y patrióticos que las maestras fidelizaban como garantes de los presupuestos ideológicos del discurso dominante. El control de la institución escolar llegaba hasta las maestras, sus conductas y pensamiento. Vigiladas y observadas por las autoridades locales (el cura, el alcalde y la guardia civil), la vecindad y las autoridades educativas (inspectores/as de enseñanza) daban cuenta de su correcto cumplimiento personal y profesional. Por lo general no se atrevían a subvertir el orden aunque eran mujeres que saben y educan.

Las prácticas y representaciones simbólicas en torno al género, evolucionaron junto a los cambios sociales y culturales, y a la propia transformación del espacio político, pero apenas tuvo repercusión en el discurso ideológico. La evolución del régimen y las innovaciones de la tecnocracia no reflejaron un cambio de roles, aunque las mujeres habían sorteado obstáculos para acceder a espacios educativos y laborales, permanecía la tradicional división sexual de la sociedad. En síntesis, el apego a prejuicios y estereotipos fue uno de los rasgos del franquismo. La memoria y la historia han mantenido activo el saber científico de esta etapa del pasado de la historia de España que ha dejado huella desde diferentes vertientes.

Añadir que la discriminación se ha prolongado en el tiempo y ha traspasado las fronteras del franquismo. Unas rémoras con las que ha tenido que luchar la sociedad democrática. Si bien los arquetipos y prejuicios sexistas han sido uno de los rasgos de la dictadura, los modelos de feminidad y masculinidad se enraizaron en la sociedad española, comportamientos que, en algunos casos, siguen anquilosados en la actualidad. No obstante, fue un proceso complejo y que experimentó algunas transformaciones a lo largo de las cuatro décadas de dictadura. Además la resistencia a la clásica división sexual propició la aparición de mujeres inconformistas con la realidad y la emergencia de nuevas culturas políticas reiteradas de forma diversa. Cuestionar las identidades

recibidas permite proponer otras formas de subjetividad, replantear la cultura política en aras de la igualdad. La imagen estereotipada de las mujeres se ha dilatado en el tiempo y aún, en la actualidad, persisten las desigualdades. Por tal motivo las políticas de género actúan apostando por la educación igualitaria, intentado lograr la equidad social. El pasado es relevante para el presente porque contribuye a desgranar muchos hechos vigentes en la historia del presente.

Time, age, and length of stay in school: a study based on registration books (Brazil, 1895-1919)*

Natália Gil
Faculty of Education
Federal University of Rio Grande do Sul (Brazil)
natalia.gil@uol.com.br

Joseane El Hawat
National Service of Commercial Learning (Brazil)
joseaneh@yahoo.com.br

ABSTRACT: This article analyzes a set of registration books, produced in Brazil, in the state of Rio Grande do Sul, from 1895 to 1919, seeking to understand, through data filled out and categories adopted for identification of enrolled students, their school careers, ages of admittance, and attendance and length of stay in school. We also intended to relate the provisions of decrees concerning public education with the records contained in the documents under study. Furthermore, we intended, to some extent, to contribute to the reflection on the potential and limits of school bookkeeping as sources that can contribute to understanding aspects of the school practice and of the experience of students in the indicated period.

EET/TEE KEYWORDS: History of school; School bookkeeping; Registration books; School age; Brasil; XXth Century.

In this article we propound a discussion on the analyses about the school movement concerning the enrollment and stay of students in school in Brazil in the late 19th and early 20th century. We focused on examining registration

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books¹ of isolated schools located in the Historical Archive of Rio Grande do Sul². Thus, initially we propose a reflection on the limits and the possibilities of using the school bookkeeping as a source for the History of Education, in this sense seeking to dialogue with some of the Brazilian researchers whose works represent important contributions to this field of study. Subsequently, we aim to present the main characteristics of the documentary corpus, the registration books, observing their materiality and discussing to what extent they were filled out according to the legal requirements. Finally, we aimed to outline, based on thorough examination of records present in these documents, some characteristics of the school admittances and school careers analyzed, emphasizing the scattered distribution of registration dates throughout the year, the multitude of students' ages, and the prevalence of short stays in public classes of Rio Grande do Sul in the considered period.

School bookkeeping materials: considerations on their use as historical source

Attendance charts, registration books, attendance books, proceedings of exams, registration record forms, school reports, inspection records, minutes of school meetings, class logs, attendance certificates, teacher timesheets, disciplinary infractions record books, diplomas. These are some of the materials of school writing that aim to organize, supervise, classify and certify the practices of teachers and students at the school. In the 19th and 20th centuries these writings gradually diversified and specialized, concomitantly and in conjunction with the process by which the school itself was gradually conceived, institutionalized and expanded in Brazilian society.

Michel de Certeau states that in modernity our societies are organized around scriptural practices. Over the past four centuries, the act of writing becomes a modern mythical practice: «*progress* is scriptural in type. In very diverse ways, orality is defined by (or as) that from which a *legitimate* practice – whether in science, politics, or the classroom, etc. – must differentiate itself»³. Thus, the modern school that is introduced in Brazil during the 19th century and that would be considered the sign of progress in the republican project⁴ assumes

¹ Collaborators in the systematization of the data collected in the registration books: Marlos Mello and Carine Popiolek, Master in Education (PPGEDU/UFRGS), and Guilardo Silveira and Taís Flôres, grantees of undergraduate research scholarships (BIC/UFRGS and CNPq, respectively).

² Rio Grande do Sul is a state located in the south end of Brazil, with Porto Alegre as its capital.

³ M. de Certeau, *The practice of every day life*, Berkeley/Los Angeles/London, University of California Press, 1984, p. 134.

⁴ Brazil became independent of Portugal, in 1822, assuming the constitutional monarchical regime. In 1889, the Republic was instituted.

the bookkeeping practice as a key element. In this school, it is required that the relevant aspects are written and, increasingly, it is only considered important that which is written. This bookkeeping production would gradually constitute and consolidate the very existence of the school, disciplining the actions and relations, defining the relevant significations. Certeau defines writing as «the concrete activity that consists in constructing, on its own, blank space (un espace propre) – the page – a text that has power over the exteriority from which it has first been isolated»⁵. Thus, according to the author,

The ‘meaning’ (*sens*) of scriptural play, the production of a system, a space of formalization, refers to the reality from which it has been distinguished *in order to change it*. Its goal is social efficacy. It manipulates its exteriority. The writing laboratory has a ‘strategic’ function: either an item of information received from tradition or from the outside is collected, classified, inserted into a system and thereby transformed, or the rules and models developed in this place (which is not governed by them) allow one to act on the environment and to transform it⁶.

Registration books, as materials of these writing practices, are part of the game described by the author. They register information received from outside, the name and age of children, for example, classify them, integrate them in a school system, transforming them into students, into slow or smart students, into satisfactory or unsatisfactory performance.

It should be noted, therefore, the possibility of thinking school writing as a teaching practice that is not restricted to teach how to write, but also refers to what is registered by the teachers to give visibility to their activities, to meet legal requirements, to support the memory. Several materials of writing would be part of the modern school and diversify over the centuries. The documentary vestiges of these bookkeeping practices can be constituted in researching the History of Education as sources that enable us to know the teaching work, the students, and some characteristics of the school ways, in addition to understanding the modes of institutionalization of school management.

In the 19th century, in Brazil, the school and the master were often confused in the same image since that school almost always consisted of only one classroom, commanded by a single teacher, who received students of different ages and educational levels. In these circumstances, the tasks of registration of enrolled students, of attendance, of performances in learning are the responsibility of the teacher. With the progress towards greater rationalization of school practices, especially throughout the 20th century, records would gradually be distributed into various materials. Similarly, with the development of inspection practices⁷ and the progressive deployment of graded schools, there was increasing

⁵ *Ibid.*, p. 134.

⁶ *Ibid.*, p. 135.

⁷ In the administrative structure designed for Brazilian education, inspectors were responsible for supervising the teacher performance and schools.

distribution of bookkeeping tasks among different education staff (inspectors, school principals, school secretarial staff, inspectors of students), responding to the needs of specialization of functions and of expansion of control over the teaching practice.

Some Brazilian studies highlighted the potential of this documentation for the research in History of Education, focusing specifically on attendance charts, which were filled out monthly by teachers for school authorities to prove the effective teaching practice. Since at least the early 19th century, still in the context of public and secular royal school⁸, there are records of «charts, produced from 1800 to 1821, filled out with information about the number of students, place of origin, age, social status, and professional occupation, performance, attendance, and duration of studies»⁹. Such sources bring elements that allow the historian's examination to characterize the individuals who attended these classes. However, as already mentioned, these writings were produced for other purposes. Attendance charts – and also registration books and attendance books – were implemented in several provinces¹⁰ to enable supervising, for example, the attendance of teachers and students in response to the legal determination that linked the maintenance of the school and the teacher's payment to a minimum of students' registration and attendance. As a result, public teachers have more widely focused on producing such writings and it is possible to assume certain profusion of these documents, proportionally, insomuch as part of them has been preserved in public archives. The same did not occur for private schools¹¹, which almost always escaped the control of the State until at least the 1930s and, therefore, may not have produced this kind of bookkeeping or may not have preserved it. On the other hand, as the maintenance of schools and the teachers' payment depended on the number of students registered, it is possible that those numbers have often been overrated¹². This is illustrated by the report of the President of the Province of Minas Gerais in 1844:

Or by the laws of Minas Gerais should be closed schools that do not have at least 24 pupils, the heads of families are required to send their children to schools; and masters have bonuses in addition to wages, according to the number of pupils who attend: all is very well arranged. Parents enroll their children, and do not send them to school; and masters complete their lists with names of individuals who exist, but that never come into the building, and

⁸ This school type, the *aulas régias*, it had still been instituted in the colonial period by the reforms accomplished by Marquês de Pombal in 1772.

⁹ Hilsdorf *apud* D.G. Vidal, *Mapas de Frequência a Escola de Primeiras Letras*, «Revista Brasileira de História da Educação», n. 17 (may/aug), 2008, p. 57.

¹⁰ After the independence of Brazil, in 1822, the territory was divided in 18 provinces.

¹¹ C.G. Veiga, *A produção da infância nas operações escriturísticas da administração da instrução elementar no século XIX*, «Revista Brasileira de História da Educação», São Paulo, n. 9 (jan-jul), 2005, pp. 73-108.

¹² We must note that the precariousness of the data collected and the incomplete character of the recorded information are always mentioned in reports that are contemporary to the records in discussion here, whether by researchers who have examined these documents.

attribute to them daily attendance as they seem fit. These charts are handed to delegates, who, not being active and capable of surprising one or another school to compare their number of pupils of the charts with those they effectively find, have to rely on information, when there are no other reasons, just for the sake of not losing the poor schoolmaster, who is the provider of a family, they assume the maps to be accurate, the government authorizes the payment, and the law remains misled¹³.

The legislation established what should be registered in those charts whose supervision was assigned to inspectors. However, several researchers have located records that went beyond that which was defined in legal prescription¹⁴. Diana Vidal, who analyzed attendance charts produced by two teachers in the Province of São Paulo in the periods 1832-1842 and 1851-1862, notes that these documents are at the same time management and memory instruments. Thus, they respond to the requirements of higher authorities but also serve the considerations about students that teachers assume necessary to record. In agreement with these observations, Amália Dias, focusing on the analysis of attendance charts produced from 1924 to 1949 in the state of Rio de Janeiro, adds that «part of these records is mandatory, other additions are communication resources employed by teachers»¹⁵.

We need to consider, in light of this, that such documents enable observing a writing about the other, insomuch as it deals with the characterization of students based on the view of the teachers and/or through the educational legislation. Thus, in agreement with Cynthia Veiga, effectively there is the production of the child as a student from the categories describing the individuals who attend the school that are gradually included in this institutional documentation. The author recalls that

the different types of knowledge in profusion from the mid-19th century systematized a condition of being a child and having childhood, and to that end different norms were prescribed to the body of the child: to be well behaved, obey, play, wear appropriate clothing, attend school, be a good student, etc. By means of the school, an age range attributed to the time of childhood was universalized, as well as a new way of children being established in the world: as students¹⁶.

This writing, which has as one of the obvious intentions to institutionalize the school, eventually produces a knowledge about schooling. A prominent

¹³ *Ibid.*, p. 94.

¹⁴ Veiga, *A produção da infância nas operações escriturísticas da administração da instrução elementar no século XIX*, cit.; Vidal, *Mapas de Frequência a Escola de Primeiras Letras*, cit.; A. Dias, *Os mapas de frequência escolar e a produção dos serviços de fiscalização do ensino no Estado do Rio de Janeiro (1924-1949)*, «Roteiro», Joçaba, 2013, pp. 13-40.

¹⁵ Dias, *Os mapas de frequência escolar e a produção dos serviços de fiscalização do ensino no Estado do Rio de Janeiro (1924-1949)*, cit., p. 16.

¹⁶ Veiga, *A produção da infância nas operações escriturísticas da administração da instrução elementar no século XIX*, cit., p. 78.

aspect in this process concerns the way the collective experience of being a teacher was constituted. According to Vidal, it is in the symbolic coordination of heterogeneous practices of a society that teachers fill out

the attendance charts, renewing, in the writing strategies, professional survival tactics, such as the maintenance of schools and the receipt of wages. At the same time, the masters implement practices of classification, planning, and hierarchization of school knowledge and subjects¹⁷.

In this sense, it is important to ask, as suggested by the author: How did teachers translate the legal requirements in the bureaucratic writing they produced? How did they invent the teaching practice in coordination with the external and internal requirements of these records? Such questions reveal possibilities for expanding the knowledge about the teachers' practice by resorting to examination of the sources addressed here. However, in the researches we developed the interest is focused on students. It is, therefore, seeking to understand who were the individuals who attended schools, the characteristics of the school path they treaded, and the recorded school performances that we have assumed the school bookkeeping as a source, specifically by analyzing registration books.

Registration books and the interest in knowing the students

Registration books, differently from attendance charts, should not be submitted to inspectors, although it was expected that they were examined in inspection visits. They corresponded to a material of the school that should serve to register the movement of students in the institution for organization by the teacher and timely verification by authorities. According to Diana Vidal, already in 1854 a decree issued by the government of the Court required that

each school had a registration book, containing the truancies and the progress of each student noted monthly until the day the student left the school, with statement of the reason for leaving; and that each enrollment was executed through the presence of a guide, which should include the name of the father, tutor, guardian or protector of the student, address, state, and profession, in addition to place of origin, filiation, and age of the student¹⁸.

This type of information would vary from one location to another, from one period to another, but is often found in the registration books, allowing the scrutiny of the students' social, economic, and educational characteristics.

¹⁷ Vidal, *Mapas de Frequência a Escola de Primeiras Letras*, cit., p. 47.

¹⁸ *Ibid.*, p. 53.

Part of the elements found in the books was prescribed in legislation, corresponding to what the education management agencies considered necessary to register. However, as pointed out before, these pieces of information were complemented with others according to the needs of registry perceived by the teachers. Thus, if on the one hand these notes allow to indicate how the norms were gradually incorporated in the context of schools, on the other hand they leave vestiges of how the categories «were gradually invented by teachers to organize the universe of the school and to classify and hierarchize students and knowledge»¹⁹. Such notes referred²⁰ to the students' personal characterization (age, skin color, condition of slave, physical traits, such as tooth decay, for example, nationality, etc.), filiation (name of the father, professional occupation, condition of illiterate, nationality, etc.), housing (address, house conditions, telephone, etc.), school performance (class of enrollment, if smart, behavior at school, school content already learned, etc.). Due to recording information of this nature, registration books comprise, according to Diana Vidal, «evidence of the social and economic conditions of families and of the relations the school establishes with them»²¹.

In this respect it is relevant to mention the possibilities that they open towards knowing and characterizing the population that effectively attended the school in each period. In addition to verifying the continuous increase of the amount of registrations – a remarkable aspect in Brazilian schools, especially in the 20th century – it becomes feasible to investigate which population groups are represented in the statistics of increase in access to schooling. That is what do, for example, Eliane Peres and Cynthia Veiga, by examining the school bookkeeping, in studies on the presence of blacks in schools. Cynthia Veiga finds in attendance charts of Minas Gerais in the early 19th century the information about the legal condition of slave of the students. In analyzing these data, she observes that is greater the presence of slave boys in private than in public classes. The author adds:

Nevertheless, in the Constitution and in all subsequent legislation there is no mention of prohibition of slaves attending private masters. What was reiterated permanently is the prohibition of their attendance to public classes of teachers provided by the State²².

Eliane Peres, in turn, examines registration books of the Pelotense Public Library night school, which operated from 1877 to 1915, intending to know who the students were. One of the questions formulated by the author referred

¹⁹ *Ibid.*, pp. 53-54.

²⁰ Here, specifically, it is considered what has been observed in books of very distinct periods from 1850 to 1950, in the sphere of the research group and through the readings of the analyses of other researchers. It is worth noting that these elements are not all located in a single book.

²¹ *Ibid.*, p. 60.

²² Veiga, *A produção da infância nas operações escriturísticas da administração da instrução elementar no século XIX*, cit., p. 95.

to the ethnic-racial belonging of these individuals. As the books had no records concerning this aspect, the author resorted to the expedient of «cross-examining the available data of students with those of participants in popular associations, especially those related to carnival, drama, abolition, class entities and, also, the press produced by blacks»²³. Thus, she demonstrates the effective possibility of registration of blacks in the school, some of which were leaders in Pelotas at the time.

Thus, as to the social condition of the students, such records contribute to identify those groups for which the school was a possibility. Diana Vidal (2008) notes that the detailed study of the last names of students would allow knowing the social origin of these individuals. Such analysis in conjunction with the consideration of the address, the knowledge of the territorial occupation of cities by different social groups and the cross-examination with the descriptions assigned to students by teachers («good nature», «runs away sometimes», «intelligent», «smart», «null», etc.) can indicate the ways the school assessment categories are permeated by judgements concerning social belonging²⁴. Similar analysis taking into account the sex or the age would enable knowing the various criteria that guide the school assessment.

Our focus here was on investigating more thoroughly, based on the paths followed by the individuals, aspects of the school experience. By coordinating the analyses of the students' movements in school, the time of admission into the institution, the obstruction of flows, the learning times, etc. with the legal requirements we intend to broaden the understanding concerning the social impact of the schooling practices. Registration books comprise data that are neither equivalent nor restricted to the data in other documents produced by the school and by the persons responsible for the management of teaching, but it is in conjunction with them that they can enable better understanding aspects of school practice and culture.

Registration and attendance books deposited in the Historical Archive of Rio Grande do Sul

Filling out registration and attendance books was one of the teacher's activities in the late 19th and early 20th century, representing a major portion of the school bookkeeping. As schools in the period often had only a single female or male teacher, responsible for all tasks for the operation of classes, the records made

²³ E.T. Peres, *Sob(re) o silêncio das fontes... A trajetória de uma pesquisa em história da educação e o tratamento das questões étnico-raciais*, «Revista Brasileira de História da Educação», n. 4 (jul-dec), 2002, pp. 75-102.

²⁴ P. Bourdieu, M. de Saint-Martin, *As categorias do juízo professoral*, in M.A. Nogueira, A.M. Catani (edd.), *Escritos de educação*, Petrópolis/RJ, Vozes, 2012, pp. 185-216.

by teachers, which should follow official requirements, enable observing both the diligence and the unwillingness in carrying out these tasks. They also bring evidence of the development of school practices, of the rationalization of the learning times, and of the constitution and categorization of children public to which the school was intended. In this sense, as previously argued, registration and attendance books constitute sources for research in History of Education that should not be disregarded.

With the aim of knowing the school bookkeeping of public schools of Rio Grande do Sul, initially from 1889 to 1930, we located books with records concerning the primary school in the Historical Archive of Rio Grande do Sul – AHRS. Most books found belong to the public classes of the region of Porto Alegre, concentrated in the last decade of the 19th century and in the first two of the 20th century.

Altogether, we analyzed twenty-nine books, with twenty-two registration books and seven attendance books. Registration books were used to record the identification data of individuals enrolled each year in schools. They also included information about the level and performance of each student. In the meanwhile, attendance books basically indicated the presence in class, through a table containing the full name of students and the school days of each month.

Considering the period in which such documents were filled out and taking into account their possible changes of location prior to becoming part of the collection of the AHRS, it should be highlighted the good condition of preservation of the set, which allowed the handling and full assessment of the information in each volume. With the exception of one volume, from which the pages of the final months were removed, all others are complete.

Importantly, the set considered corresponds to that which, for reasons unknown, has been preserved and deposited in the collection of the AHRS. This is an incomplete collection dispersed in time that cannot be taken as representative of all school bookkeeping practices in the period²⁵, although it is a valuable source to understand the gradual constitution of a method of school assessment, of control of the flow of students, and of inspection of the teacher's work.

The sequence of years of a book not necessarily corresponds to the total period in which the school operated. Due to this reason, caution is needed in analyses of the duration of schooling, especially for enrollments in the last and penultimate year of registration²⁶. It is also true that a student leaving may not represent the end of schooling, assuming the hypothesis that the student changed to another school. Considered these limitations, detailed analysis of the set of materials has allowed determining some patterns in the school movement in the period.

²⁵ It is possible to know through the reports of Public Instruction that there were many more schools in operation in the state than books deposited in this collection.

²⁶ Research has shown that very rarely the stay in school exceeded three years.

From the point of view of materiality, all volumes are large, hardcover, lined books, where the masters would handwrite specific data of each student. It was observed that in the attendance books the teachers would draw the internal tables by hand for filling out, while most registration books had a previously established interior configuration. It should be noted that in books I213, I221, and I222²⁷ the categories came printed in the book itself.

In relation to the period of the books researched, 18 of them have records about enrollments registered throughout the 1910s. According to the Report of Public Instruction of 1912²⁸, contained in the Report of the Secretary of Interior and Exterior Business, public education at the beginning of this period was provided to the population through the following institutions: supplementary school, elementary schools, and isolated schools²⁹. Of these institutions, isolated schools were responsible for the majority of enrollments³⁰.

Among the isolated schools there were the so-called «public classes», that is, schools of only one room, with a single teacher, operating in adapted buildings and under direct responsibility of the state government administration. The books in the collection of the AHRS all refer to this type of school. An aspect to be considered about the set of books evaluated, in this sense, is that there is no book – no registration book and no attendance book – of graded school³¹.

Another particularity of the material examined is the predominance of mixed classes. In the period under study, public education provided in Rio Grande do Sul could be categorized into three different types: female, male, and mixed. The predominance of mixed classes verified in the set of books located is in accordance with the context of the time, as observed in the general data presented in the report of 1912. According to this report, of the 1197 isolated classes present in Rio Grande do Sul, 669 were mixed, 437 of them were for males, and only 91 were exclusively for females³².

²⁷ *Livro de Matrículas da Aula Pública Mista da Profa. M. Innocência C. e Silva*, Porto Alegre, 1899-1904, AHRS, código I213; *Livro de Matrícula da 37ª Aula Pública Mista da 1ª Região Escolar*, Porto Alegre, 1905-1910, AHRS, código I221; *LIVRO de Matrícula da 29ª Aula Pública Mista da 1ª Região Escolar de Porto Alegre*, 1905-1911, AHRS, código I222.

²⁸ *Relatório apresentado ao Exmo. Sr. Dr. Carlos Barbosa Gonçalves, Presidente do Estado do Rio Grande do Sul, pelo Dr. Protasio Antonio Alves, Secretário de Estado dos Negócios do Interior e Exterior, em 9 de setembro de 1912*, Porto Alegre, Oficinas Graphicas da Livraria do Globo, 1912.

²⁹ For further information on this issue see E. T. Peres, *Aprendendo formas de pensar, de sentir e de agir: a escola como oficina da vida - discursos pedagógicos e práticas escolares da escola pública primária gaúcha (1909-1959)*. Doctoral Thesis, Faculty of Education (Supervisor: M. A. Nogueira), Belo Horizonte, Universidade Federal de Minas Gerais, 2000.

³⁰ N. Gil, *Pequenos focos de luz: as escolas isoladas no período de implantação do modelo escolar seriado no Rio Grande do Sul*, «Revista Brasileira de História da Educação», vol. 16, n. 2 (apr-jun), 2016, pp. 261-284.

³¹ The location of other collections and the possibility of in-depth study of records of graded schools is one of the objectives proposed for the following steps of the research.

³² *Relatório apresentado ao Exmo. Sr. Dr. Carlos Barbosa Gonçalves, Presidente do Estado do*

Classification of schools as mixed leads, initially, to assume the coexistence of girls and boys during classes. However, such coexistence is not necessarily what occurs. In Chapter I of Decree No. 89³³, which addresses the provision and management of schools, it is determined that groups of students could stay together or separately:

In mixed schools attendance will be simultaneous, or classes will be provided twice a day, one for male students and one for female students, if required due to the number of students or to the convenience of teaching, according to the judgment of the respective regional inspector³⁴.

It is observed that when a public class is called mixed, it was not ruled out the possibility of boys and girls studying in alternating shifts, the final decision being at the discretion of the responsible for regional inspection to which the school was subjected.

The guidelines of Decree No. 89 share the responsibility of school bookkeeping among the regional inspectors, District Councils and teachers. Regional inspectors should perform quarterly visits to the schools of their respective region. One of their tasks was to examine very carefully the schools' bookkeeping, evaluating the accuracy of registrations and attendance (Art. 13, IV).

In cases in which there were one or more schools in one education region, a District Council should be created, composed of «five heads of family» who had their children studying in these schools (Art. 16). In this situation, the District Council had the duty of visiting and inspecting monthly the schools of the respective district, where they should carefully evaluate the registration and attendance books (Art. 22, I, IV).

As to teachers, they should «register the students and conduct the school bookkeeping of the school they managed» (Art. 67, 6th), and with the set of these data prepare and submit semiannually to the regional inspector a chart with the list of enrolled students along with their respective attendance, age, nationality and performance (Art. 67, 12th). It should be noted that such records, verified monthly by the inspector or district councilor, validate the work of teacher and enable the receipt of their salary, in addition to supporting the official school statistic of the period (Art. 90). It can be observed in the legislation of Rio Grande do Sul that if the registrations were not recorded and the attendance charts were not prepared, teachers could be punished with suspension of work and, consequently, of their respective salaries within twenty to thirty days. In

Rio Grande do Sul, pelo Dr. Protasio Antonio Alves, Secretário de Estado dos Negócios do Interior e Exterior, em 9 de setembro de 1912, op. cit., p. 194.

³³ Rio Grande do Sul, *Decreto n. 89, de 2 de fevereiro de 1897. Reorganiza a instrução primaria do Estado. Leis, Decretos e Actos do Governo do Estado do Rio Grande do Sul de 1906*, Porto Alegre, Oficinas Typogr. de Echenique Irmãos & Cia, 1907.

³⁴ *Ibid.*, p. 40.

case of recidivism, the teacher was removed from the school, and in the case of being removed three times, the teacher would be dismissed (Art. 67).

Completion of registration books follows student identification categories which, although with minor changes from a book to another, have markedly stable elements. Analysis of these elements enables us to see the gradual definition of the child subject in the school space, that is, the student. In the registration books under study, although there is a requirement by the public authority regarding the completion and consequently the inspection of those documents, we observed some differences in the categories employed. Of the set under study, two books presented the greatest changes: *Aula Mista do Arraial do Partenon* (I211)³⁵ and *43ª Aula Pública Mista do Passo do Dornelles* (I227)³⁶. In the first case, the teacher changed the categories in 1898, including blank spaces for exclusion, performance, and conduct. Such inclusions would possibly be related to an adaptation of school bookkeeping to requirements of Decree No. 89 signed the previous year (1897) and of the Internal Regulations of Educational Establishments of the State. In the second instance, the book undergoes successive changes. In 1910, with the arrival of teacher Adelaide Rios e Silva, the blanks for «housing» and «place of origin» are excluded, while those for «performance» and «cult» are created. In 1915, with the new public class teacher, Ozoriolina da Silva, there is the inclusion of blanks to register «attendance», «truancies», and «conduct», in addition to a change in the structure of the age category, separating into the age groups 7-9, 10-12, and 13-14 years, each divided according to sex, between «M» and «F».

By visually analyzing the 22 registration books and the categories adopted in each of them, we found a similar structure in 14 public classes, with minor variations as to word order (for example, «year, month, day» and «day, month, year» in the enrollment date), but in general the sequence of categories is: number, name, filiation, sex, age, nationality, enrollment date, attendance, exclusion, performance, conduct, and comments. The other public classes added blanks such as «religion» or «cult» (*Aula Mista do Arraial do Partenon* and *Aula Mista do Caminho do Meio*, respectively) or «housing» and «housing of each one» (*Aula Pública Mista do Passo do Dornelles* and *Escola Mista São Roque*). Another minor difference is the category of numbers (sequence in which students are enrolled). In the books of the 12ª *Aula Pública* and of the 4ª *Aula Mista da Capital*, despite the title of the column being blank, the data are filled in the order of admittance of the students.

Despite some differences as to completion and even if it is taken into account that the legislation specified a minimum of information to be collected, the

³⁵ *Livro de Matrículas dos Alunos da Aula Mista do Arraial do Partenon*, 1895-1899, AHRS, código I211.

³⁶ *Livro de Matrícula da 43ª Aula Pública Mista do Passo do Dornelles*, 1908-1918, AHRS, código I227.

books analyzed indicate the five sets of devices that Diana Vidal³⁷ details in her analysis of the attendance charts of São Paulo. Also here, the teachers were responsible for: numbers (numbering the students, quantification of truancies), identification (name, age, filiation), management (registration of enrollment date, proof of beginning of the teaching work and interruptions), pedagogical assessment (performance), and the social and behavioral assessment (blanks for conduct and comments).

The school time, the ages to learn, and the stay in school

The books enable seeing the slow process of configuration of proper school time. Defining the duration of classes, rest periods, holidays, as well as establishing an age to attend school and a time for registration of students are characteristic elements of the modern school that were gradually established throughout the first half of the 20th century. Rita Gallego points out the historicity of these aspects, noting that

the school time, as one of the social times, is also diverse and plural. It consists of a social system of temporal references based on which are defined, organized, and regulated the functioning, rhythms, coordination, and synchronization of the interactions within the school; thus, it is the result of a cultural and pedagogical construction³⁸.

The legislation of public instruction, in Rio Grande do Sul, sought to discipline in many aspects the relations of inspectors, teachers, students, and families with the times of learning, obeying, teaching, assessing, inspecting. Decree No. 89, of 1897, in its Art. 46, indicated that «in the internal rules shall be established the conditions for enrollment, attendance, operations, bookkeeping, and office hours of the schools». As for the enrollment, for example, the regulation defined that the children's enrollment in schools could be carried out from the beginning of the year until September, that is, only three months before the end of the term. In several of the books analyzed, initial registrations appear concentrated in the first months of the year (January to April). In any case, the most remarkable aspect is the continuous admittance of students practically throughout the entire year, almost always up to the deadline established by the law. In the registration book of the Aula Pública Masculina da Azenha (I219)³⁹ there is a note at the end of the 1903 records: «We closed this registration in September 30, 1903».

³⁷ Vidal, *Mapas de Frequência a Escola de Primeiras Letras*, cit.

³⁸ R. de C. Gallego, *Uso (s) do tempo: a organização das atividades de alunos e professores nas escolas primárias paulistas (1890-1929)*, Master Thesis, Faculty of Education (Supervisor: D. B. Catani), São Paulo, Universidade de São Paulo, 2003, p. 18.

³⁹ *Livro de Matrícula da Aula Pública Masculina da Azenha, 1902-1910*, AHRS, código I219.

In the registration book of the 37^a Aula Pública Mista da 1^a Região Escolar de Porto Alegre (I222) there are enrollments carried out in October, followed by the note: «Closed in October 31, 1905». It is evident the importance at the time of defining the deadline for registration of new students, which is observed both through legislation that attempts to regulate this process and through the existence in some books of explicit notes concerning that. It is also observed that in some cases the records indicate the disobedience of the law. Gallego points out, in her study about schools of São Paulo, that

if it is true that there were many ways found by the State to prescribe the ideal mode of organizing the school time, in particular the legislation, whether through the calendar or the daily distribution of time, it is no less true that the prescriptions were almost always much debated and questioned not only by lawmakers, but mainly by inspectors, principals, teachers, and parents; they were even circumvented, specially by teachers⁴⁰.

Disobedience to the law is also observed with regard to the age of individuals enrolled. It has been observed that there are major differences between the legal prescription and the records in the school bookkeeping. The ages found in the records are more varied than the official determination. Although the legal prescription, in 1897, in Rio Grande do Sul, indicated that «will only be admitted for registration in public schools children aged from 7 to 13 years» (Decree No. 89, Art. 39), that did not mean the absence of children with different ages in relation to these. In 1906, the Regulation of Public Instruction, through Decree No. 874⁴¹, February 28, effects an amendment that, however, maintains the deterrent of registration of children aged under 7 years:

Children aged under 7 years will not be admitted for registration, being at the teacher's wise discretion the determination of the age up to which it is lawful for the student to attend school without breach of discipline, never, however, beyond 16 years of age; except in the case of mixed schools, from which students will be excluded as soon as they reach the age of 12 years (Art. 91, 2nd, our translation).

It is possible to find during the whole period younger or older children than anticipated by the regulation attending schools. Especially significant is the registration of children aged 6 years, but some children aged 5 years and a very few aged 4 years can also be found. The age of termination of studies is more difficult to determine, both in legislation – as can be observed above – and in practice. It can be found, in the books analyzed, the presence of individuals

⁴⁰ R. de C. Gallego, *Uso (s) do tempo: a organização das atividades de alunos e professores nas escolas primárias paulistas (1890-1929)*, cit., p. 27.

⁴¹ Rio Grande do Sul, *Decreto n. 874, de 28 de fevereiro de 1906. Reorganiza a instrução pública do Estado. Leis, Decretos e Actos do Governo do Estado do Rio Grande do Sul de 1906*, Porto Alegre, Oficinas Typographicas D' «O Independente», 1912.

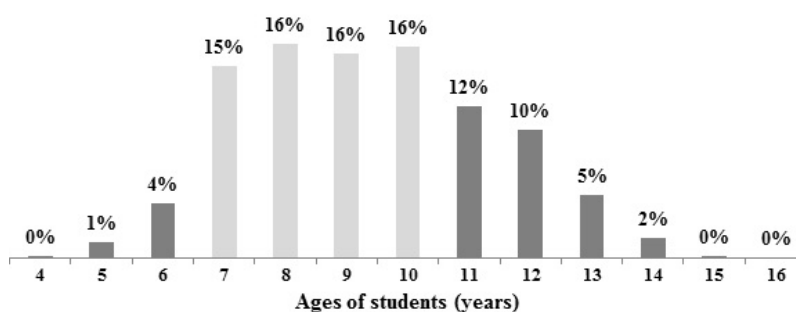
aged 14, 15, and 16 years. Anyway, it is remarkable the progressive decrease of enrollments from 12 years of age.

The discussion on the construction of school age and on some of its social implications points, in fact, to aspects to which the examination of registration books can contribute. Maria Cristina Gouveia points out that, in Brazil, the compulsory school laws established the students' age range corresponding approximately to that which Rousseau indicated as the period of conduct of learnings, that is, from 7 to 12 years of age. According to the author, in the case of Brazil,

the 19th century incorporated educational discourses that advocated the educability of childhood, the civilizing role of education and, within this reflection, the definition of an ideal period for the acquisition of elementary instruction. In the 800s, that was increasingly understood as having to be acquired in school spaces. It was to the child in the period of childhood, from 7 to 14 years of age, that were directed the public education projects⁴².

Results of the research with the registration books have shown, according to the interpretation of this author, similarly to others, that the process of definition of childhood through the condition of student was slow. On the one hand, it would take a long time until the children were effectively all attending the classes; on the other hand, it is noteworthy that the concentration of the ages of those enrolled indicates a narrower range than prescribed by law. Thus, in addition to consideration of the ages mentioned in the legislation, it is interesting to highlight which were those that effectively concentrated the enrollments.

It may be observed that individuals aged from 7 to 10 years are more frequent in the schools. Each year the approximate percentage of students of each age follows the distribution below:



Pic. 1. Distribution of ages in the registration records. (From: Registration books examined in this study).

⁴² M.C.S. de Gouveia, *Tempos de aprender: a produção histórica da idade escolar*, «Revista Brasileira de História da Educação», n. 8, 2004 p. 275.

Thus, although the legislation defined the school age as 7–13 years, it is observed in Rio Grande do Sul that, effectively, society – that is, the family and/or perhaps even the teacher – considered appropriate to terminate before that the school career.

Analysis of the ages in which students are effectively enrolled leads us to think about the reasons why individuals stop attending school. There is strong evidence that the definition about the «conclusion» of the schooling is more based on the expectations of families and on the times of study that were usual in the period, as well as on the users' representations about what should be learned at school, rather than on the legal prescriptions or pedagogical knowledge. Philippe Perrenoud points out, referring to the European case, that

in the first grammar schools, in the first universities, in the first schools, teachers did not seem to worry much about assessing the learning of their students. It was each one's responsibility the assessment of the learning of their own students by comparing themselves with others or with the professionals in exercise for whom they had admiration, starting with the schoolmaster. The student and family had the responsibility of deciding if there was any spiritual interest or any material gain in following a learning career, and at which time it was proper to quit it, perhaps to continue with another master⁴³.

In the registration books examined there are blanks in which teachers should indicate the reasons and the date of removal of students from the school. Among the categories indicated in the column intended for *Exclusion* there are: «death», «relocation», «coming of age», «completion», «bad behavior», «no statement». Rarely, however, these columns appear filled in. Eventually there is the indication of «coming of age» as cause of *exclusion*. This is the case of the book of the 38^a aula de Porto Alegre (I228)⁴⁴ where this is the justification notified for the exclusion of a 16-year-old student. The same occurs in the book of the Aula Pública Masculina da Azenha (I219). These records are in line with that which the law required in the period.

The shortage of elements instigates other hypotheses about the definitions for the beginning and the end of the school career in the period. It is possible to assume the marked importance of other determinants, rather than the legal prescription, such as age of siblings and the social and family perception that the child had already learned what was necessary or that the child was not capable of learning more and better. In this sense, we have followed through the registration books the ages in which students stopped attending the elementary school trying to understand what are the characteristics of this movement.

In the registration book of the Aula da Azenha (I219) the exclusion age is markedly at 13 years. In this there are a few students aged 14 years and none

⁴³ P. Perrenoud, *La fabrication de l'excellence scolaire: du curriculum aux pratiques d'évaluation*, Geneva, Librairie Droz S.A., 1984, p. 83-84.

⁴⁴ *Livro de Matrícula da 38ª Aula Mista do Caminho do Meio entre Casa Branca e Capão da Fumaça*, Porto Alegre, 1910-1918, AHRS, código I228.

above this age. It can also be observed that among students with longer career in school (3, 4, or 5 years of schooling) it is frequent that the age at the last year is 12, 13, or 14 years. In the book *Aula mista da Azenha* (I218)⁴⁵, in the 5 years of registration (1902–1906), there is only one student aged 15 years, seven aged 14 years, and all the others aged less than that. However, in this book there are students for whom there is no indication of age. In the *aula pública mista da Vila de Caxias* (I217)⁴⁶ until 1907 it is common that in the last year of attendance to school students are aged 13 years, 12 sometimes and, notably for those that start the career at age of 5 or 6 years, that they are aged 11 years by the termination of the career. In this book, there are only 5 students aged 14 years and a single one aged 15 years during the 9 years covered by the records.

It is important to note that there are many inconsistencies in the ages indicated in the documentation analyzed. This prevents us from reaching more definitive conclusions, yet provides relevant clues towards understanding the characteristics of school attendance in the period and location under study. There are situations of obvious error in the age indicated, since it is not possible for someone be aged lower than before. This is what occurs in the book I211, whose notes cover 5 years of operation of the school. In this book there are few students aged 14 years, especially in the early years of school record, then there are no students aged over 13 years. In this sense, it is interesting to note that the student J. Rozada is registered as being aged 13 years in 1895, in the two following years as being aged 14 years, and, in 1898, last year she attends this public class, she appears again as being aged 13 years. While in the books I213, I221, I222 the variation of the recorded ages of a same child in different years is absurd to such extent that they could not be considered in the analyses that follow. For example, the child V. da Cruz appears as aged 10 years in 1899, 9 years in 1900, 11 in 1901, 12 in 1902, and 10 in 1903 (I213).

One of the characteristic aspects of the period under analysis, widely documented in the sources considered here, is the fact that the registration of new students could occur at any age, among the ones already mentioned above. Based on the records related to the first registration, a significant concentration of the occurrence is observed from 7 to 10 years. This age group accounts for about 64% of the total notes examined. Table 1 presents the students' age reported more frequently⁴⁷ on the date of first enrollment, in the documents analyzed:

⁴⁵ *Livro de Matrícula da Aula Pública Mista da Azenha, 1902-1906*, AHRS, código I218.

⁴⁶ *Livro de Matrículas da 4ª Aula Pública Mista Efetiva da 3ª Léguas da Vila de Caxias, 1901-1907*, AHRS, código I217.

⁴⁷ Table 1 presents the ages with higher occurrence. It is important to reiterate that in records of the registration books were found students aged from 4 to 16 years on the date of first enrollment.

First enrollment (years)	6	7	8	9	10	11	12	13
Representativeness of the age	6%	18%	17%	15%	14%	10%	8%	4%

Table 1. Age of students in the first enrollment (From: Historical Archive of Rio Grande do Sul)

Records of the registration book of the Aula Pública Masculina da Azenha (I219) present, however, a peculiar movement, which differs from the others. In this school, whose information covers the period from 1902 to 1910, it is much more frequent that the first enrollment occurs at the age of 11 years. Of the 354 names registered until 1907, only 7 were aged 6 years at the first enrollment and 20 were aged 7 years, while 61 of them were aged 11 years. In this book are also very common the first enrollments of students aged 12, 13, and 14 years, which does not occur in the other materials analyzed. It is also interesting that, despite the records cover a decade, there are no careers over 5 years of school attendance and that the longer careers, usually, in this case, are limited to three years of schooling.

Because of the incompleteness of the documentation examined, it cannot be confidently asserted that a student's first enrollment in the registration book corresponds to that child's initiation of schooling, since he/she could have come from another school. It is possible that this has happened a few times, although it does not seem appropriate to assume that the change of school was a constant in the period. Neither it is certain that the last record observed represents the end of a student's schooling. In order to advance in the understanding of the patterns of beginning and end of schooling, analyzing the registration of groups of siblings proved to be very productive, with special attention to the ages.

In this sense, the analysis of the book *Aula do Arraial do Partenon* (I211) allows us to observe relevant movements. It can be observed a tendency to enroll several siblings together when the younger reached one of the ages in which it was considered possible to attend school (5, 6, 7, or 8 years). The understanding of the right time to start schooling probably followed more the current representations in the social space than the legal definition. To illustrate this movement, it can be observed the age of the following groups of siblings whose initial enrollments occurred at the same time:

Enrollment Year	Family	Student	Age at first enrollment
1895	Guerra	P.	10
		C.	8
		J.	7
	Mass	H.	8
		V.	8
		A.	7
		A.	5
1986	Machado	C.	11

		L.	8
		I.	7
1897	Araujo	R.	10
		E.	9
		R.	8
	Fortes	A.	13
		M.	7
		G.	6
	Ribas	A..	11
		A.	9
		J.	6

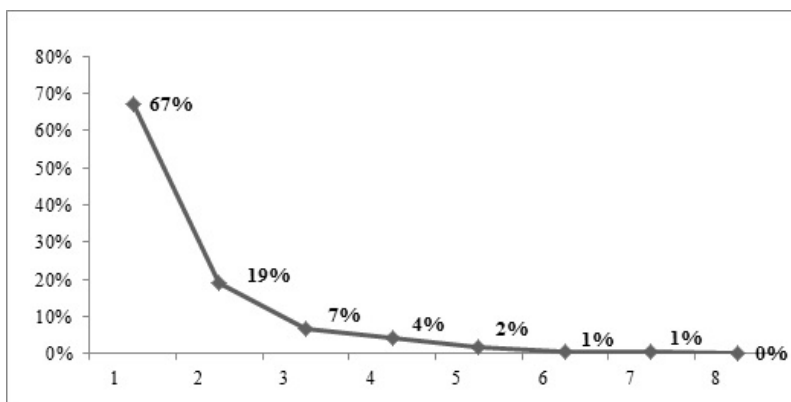
Table 2. Groups of siblings and their respective ages in the first enrollment. (From: Livro de Matrícula da Aula do Arraial do Partenon I211)

Certainly there are exceptions, such as the situation of a girl who is enrolled, in 1895, at the age of 6 years; in the following year her brother is enrolled at the age of 5 years (or maybe 4 years, since he appears as being aged 5 years during 3 years in a row); and, in 1898, another brother is enrolled aged 6 or 7 years.

Perhaps more important than the fact that the siblings begin to attend school all together is to note that it was quite common that they all stopped attending school when the eldest reached the age of 13 years. It is the case of three siblings who, in 1895, are enrolled together being aged 7, 8, and 10 years. They attend school together for three years in a row and stop attending school at the same time, coincidentally when the eldest was aged 13 years. A similar reason might also explain the registration of two sisters at the same time, one aged 9 years and the other aged 13 years, who only attended school for one year. Although these cases are very frequent in the documentation, here too there are exceptions such as, for example, the situation of two sisters that are enrolled at the same time, in 1895, one of them aged 8 years and the other aged 13 years. The oldest stays in school for only one year, while the younger sister attends school for 5 years⁴⁸.

Most students, in fact, attended school for only 1 or 2 years. Based on the records of the registration books, it can be observed that the curve for stay falls sharply, making rare students who attended the same school for 3 and 4 years, and even rarer the cases of those who stayed for over 5 years.

⁴⁸ In these analyses we considered siblings students with the same last names whose records appear in sequence. For the interspersed records we disregarded the most common last names (Oliveira, Silva, and others). In order to confirm the analyses, in some cases we verified the name of the adult responsible for the registration (father, mother, or guardian). Even with these precautions we cannot exclude, for example, the hypothesis of there being cousins.



Pic. 2 – Time of stay of the students. (From: Livros de matrícula – AHRS)

Concerning the longest stays, in the set analyzed, the 4^a Aula Pública Mista da Vila de Caxias was the school that concentrated the largest number of students who attended for 7 consecutive years the same public school. According to the enrollment records, in 1901 the following students were enrolled: M. Bergazzo (8 years)⁴⁹, B. Bergazzo (6 years), V. Milani (6 years), A. Milani (6 years), A. Bertoldo (8 years), E. Viezo (8 years), A. Viezo (6 years), J. Esperanza (6 years), M. Esperanza (7 years), A. Zinanni (7 years), E. Leonardi (7 years), A. Mariani (10 years), and A. Leonardi (5 years). This same group remained in the lists of children enrolled in the following years until 1907. While the only occurrence observed of 8-year stay was the case of F. Zoldan, in Escola Mista São Roque, de Garibaldi. The student was enrolled in 1904, aged 6 years, and stayed enrolled until 1911, aged 12 years.

For example, it is worth noting the situation of the Aula Pública do Arraial do Partenon (I211) where, of the 254 students enrolled in the five years of operation from 1895 to 1899, we observed the following distribution as to the stay in the same school: 132 students attended it for only 1 year; 63 students stayed for 2 years; 29 students, for 3 years; 15 students, for 4 years; 11 students, for 5 years; and 4 students stayed for 6 years. It is possible to affirm that often students who accumulated the more years of education are those who were admitted the younger. Thus, of the 7 students who stayed enrolled for 5 years in this school, only one of them was aged over 8 years at the first enrollment. The same occurs with the registrations of the 38^a Aula Mista do Caminho do Meio (I228), which covers from 1910 to 1918 and where the longer careers are of students who stayed enrolled for 6 years (3 students) and 7 years (3 students). These 6 individuals were aged 8 years or less at the first enrollment. A similar situation is observed in the enrollments of two more registration books (I217

⁴⁹ It is indicated in parentheses the age at initial enrollment.

and I214)⁵⁰. It is noteworthy that these observations coincide with the results of the study conducted by Fernanda Rocha⁵¹, based on registration books of the school Grupo Escolar Paula Rocha, in Minas Gerais. The author followed the career of the 25 students enrolled in the first grade in 1907 in that institution and could observe that «most of the older students repeated less times the 1st grade, and most of the younger students repeated two, three, or more times the first grade»⁵². Although the admittance to school of young individuals is related, at least in some schools, to longer careers, enrollment at young age is no guarantee of a long school career. As has been pointed out above, the most recurrent is that students attended classes for only one or two years in a row and this means that, whatever the initial age of registration, careers are most commonly short.

Conclusion

It is important to point out that the enrollment and stay in school do not follow, after all, very stable patterns. What we sought to emphasize here were just some predominances or specific characteristics restricted to a scarce set of registrations located. They, however, provide significant elements to advance in the hypotheses about what (little) the school experience represented for these generations. Most students attended school for only one school year. It can be hypothesized that the performance of the teachers, responsible in the period for almost all the work of organization of school and conduct of classes, had significant impact on the determination of the ages of study and of the times of stay in school. In this sense, for example, it is worth considering the observation of the book of the 38^a Aula Mista do Caminho do Meio (I228), where there are many students who stop attending school for one year or two and are enrolled again subsequently, attending it for some more time. One possibility of explaining this movement that is so recurring and that differs so much from that observed in the other books is that the teacher insisted so the families enrolled their children again and maintained them in school for a little more time. Confirmation or refutation of hypotheses of this type implies the search for other sources and the design of new focuses for the continuity of research. Instigating new interests and investigative possibilities is, after all, one of the results intended in this study.

⁵⁰ *Livro de Matrículas da 26^a Aula Mista da Capital, 1899-1905, AHRS, código I214.*

⁵¹ F.C.C. da Rocha, *Trajatória de alunos em um Grupo Escolar mineiro, entre 1907 e 1916: o tema da repetência escolar*, Cuiabá/MT, 2013.

⁵² *Ibid.*, p. 7.

Platero y yo, ¿libro para la infancia y las escuelas? Un estudio histórico-cultural sobre la representación pedagógica de la obra literaria

J. Carlos González-Faraco
Department of Education
University of Huelva (Spain)
faraco@uhu.es

Heliodoro M. Pérez-Moreno
Department of Education
University of Huelva (Spain)
heliodoro.perez@dedu.uhu.es

Juan Ramón Jiménez-Vicioso
Department of Education
University of Huelva (Spain)
jjmenez@uhu.es

Platero and I, a book for children and schools? A cultural-historical study about the pedagogical representation of a literary work

ABSTRACT: *Platero and I* is the most popular work of Juan Ramón Jiménez, one of the most important Spanish poets of the 20th century, who was awarded the Nobel Prize for Literature in 1956. After *Quijote*, *Platero* is the most reissued work of Spanish literature of all the times. Although it was not written for children, it has usually been considered a work of children's literature. Almost since its first appearance in 1914, its presence in Spanish and Hispanic-American school culture has been extraordinary. Based on the analysis of numerous Spanish textbooks published over the last one hundred years, in this article we study the long educational trajectory and the various pedagogical representations (or readings) of this book.

EET/TEE KEYWORDS: Children's literature; Reading; Textbooks; Literary education; Spain; XXth Century.

Introducción¹

Platero y yo, la obra más conocida del poeta español y premio Nobel de Literatura Juan Ramón Jiménez, no fue escrita para niños ni responde, por su escritura y su contenido, al modelo de libro típicamente destinado a esos lectores. Sin embargo, ha sido considerada tradicionalmente como una obra de literatura infantil, y ha gozado de una relevante y continuada presencia no sólo en la enseñanza española, sino también en la de países hispanohablantes e incluso en la de otros muchos. Ello ha sido posible gracias a las múltiples traducciones de que ha sido objeto, aunque la primera se hiciera esperar casi treinta años desde la aparición del libro en 1914. Fue en 1943 cuando el genovés Carlo Bo publicó su traducción al italiano², poco después de que viera la luz su largo ensayo sobre la poesía³ de Juan Ramón Jiménez, recibido muy positivamente por el propio poeta⁴. Quizás haya sido Italia uno de los países de habla no española que con mayor interés ha acogido esta obra, como se deduce del hecho de que son siete las traducciones y diez las ediciones (la última en 2012) hasta ahora publicadas en ese país, amén de dos adaptaciones, una teatral y otra musical⁵. Por supuesto, las ediciones en español son innumerables. Baste citar el caso de la editorial argentina Losada que ha publicado más de cincuenta, diez de ellas entre 1939 y 1949⁶.

La extraordinaria popularidad de esta «elegía andaluza» comenzó casi inmediatamente después de su primera edición, y se debe, en buena medida, a su percepción y consecuente consideración como obra de literatura infantil, lo que, por otra parte, no es casual. Las claves principales, aunque no únicas, para conocer y comprender cómo se originó y se afianzó esta imagen literaria de *Platero*, hay que buscarlas primeramente en las circunstancias de esa edición príncipe; después, en las incontables ediciones más o menos adaptadas y pensadas para ese público⁷ y, por último, en la ubicuidad escolar del libro a lo largo del tiempo.

¹ Este artículo procede de un proyecto de investigación titulado «Juan Ramón Jiménez en la cultura escolar española», promovido por el Grupo de Investigación de Estudios Culturales en Educación de la Universidad de Huelva, España. Este proyecto, que continúa su desarrollo, cuenta con el patrocinio de la Fundación Zenobia y Juan Ramón Jiménez de Moguer (Huelva, España) y del Centro Internacional de la Cultura Escolar (CEINCE) de Berlanga de Duero (Soria, España). Queremos expresar nuestro mayor agradecimiento a estas instituciones y, especialmente, a sus respectivos directores, D. Antonio Ramírez Almanza y D. Agustín Escolano Benito.

² J.R. Jiménez, *Platero*, Florencia, Vallecchi, 1943.

³ C. Bo, *La poesía con Juan Ramón Jiménez*, Florencia, Edizioni di Rivoluzione, 1941 (traducción al español de Isabel de Ambúa, publicada en 1943 en Madrid, Editorial Hispánica).

⁴ M.I. Mininni, *Las andanzas de Platero en Italia. Entre traducción y adaptación*, in S. González Ródenas, E. Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, Huelva, Universidad de Huelva, 2017, p. 355.

⁵ *Ibid.*, p. 368.

⁶ A. Campoamor González, *Bibliografía general de Juan Ramón Jiménez*, Moguer, Huelva, Fundación Zenobia-Juan Ramón Jiménez, 1999, pp. 22 y 23.

⁷ A.M. Navarrete Curbelo, *Platero y yo: un siglo de adaptaciones para niños*, in González

Para estudiar estos procesos vamos a recurrir solamente a dos de estas fuentes. Primeramente, nos detendremos en el marco histórico y en los acontecimientos que rodearon su publicación en la segunda década del siglo XX; entre otras cosas, en la decisiva influencia que supuso para el porvenir de la obra su favorable acogida por Giner de los Ríos y la Institución Libre de Enseñanza. En segundo lugar, nos valdremos de una selección de los fragmentos de *Platero* que recogen los libros de texto a fin de establecer las características de su recepción escolar durante el siglo XX, llegando incluso a la primera década del XXI. Para interpretar adecuadamente los procedimientos y las consecuencias de la traducción pedagógica y educativa de esta obra literaria, conviene observarla dentro de un contexto más amplio, pues no se trata en absoluto de un caso insólito. Otras obras importantes han experimentado procesos similares y, en todos los casos, se ha despertado un enconado debate sobre cómo convendría acercar los clásicos a la infancia y a la escuela, cómo darlos a leer, en suma. Valga el *Quijote* como ejemplo elocuente y paradigmático de ello.

1. Platero y Don Quijote en las escuelas españolas

Hay obras literarias que han gozado de una audiencia sobresaliente en la historia de la escuela española y que, por ello, viven en la memoria de quienes las leyeron, normalmente a trozos y tal vez únicamente en las aulas, y dejaron huella en su educación literaria y sentimental. Una fue *Cuore*, de Edmondo de Amicis, que tradujo al español muy tempranamente, en 1887, Hermenegildo de los Ríos, y disfrutó de una dilatada y entusiasta acogida por parte de maestros y alumnos⁸, y también, todo hay que decirlo, del favor político tras la Guerra Civil⁹. Pero de todas ellas quizás hayan sido el *Quijote* y *Platero* las más intensa y extensamente «escolarizadas» en las escuelas españolas y en las de muchos países de habla hispana. Por eso, vale la pena que nos detengamos brevemente

Ródenas, Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, cit., pp. 43-64. Véase también: Campoamor González, *Bibliografía general de Juan Ramón Jiménez*, cit.

⁸ M. García Aguilar, *Traducción y recepción literaria de la obra de Edmondo de Amicis en España (1877-1908). Estudio crítico y repertorio bibliográfico*, «Sendebarr. Revista de Traducción e Interpretación de la Universidad de Granada», n. 17, 2006, pp. 99-118; F. Canes Garrido, *La influencia del libro Corazón del italiano Edmundo de Amicis en la educación española*, in J.M. Hernández Díaz (coord.), *Influencias italianas en la educación española e iberoamericana*, Salamanca, FahrenHouse Ediciones, 2014, pp. 35-53.

⁹ González Ródenas y Young escriben: «Sólo tras el exilio de su autor, durante la época más represora del franquismo, Platero se vio desplazado de los colegios por la traducción de *Cuore* de Edmundo de Amicis. Con *Corazón*, se ensalzaban valores como la moralidad, el amor a la patria y la virtud cívica, encarnados en diversos héroes juveniles italianos». Véase: S. González Ródenas, H.T. Young, *Introducción*, in J.R. Jiménez, *Obra Poética*, vol. 2, *Obra en Prosa*. Tomo III. *Elejías Andaluzas. Platero y yo*, Madrid, Espasa Calpe, 2005, p. 431.

a observar ciertos paralelismos entre estas obras. No somos, desde luego, los únicos a los que se les ha ocurrido hacer este emparejamiento¹⁰, a pesar de que, a primera vista, poco tienen que ver la una con la otra.

Algunos de estos «paralelismos» son palmarios. Para empezar estamos ante las dos obras de la literatura en español más editadas y traducidas de todos los tiempos. Pocos comienzos habrá más reconocibles y más recitados de memoria que el de la novela cervantina («En un lugar de la Mancha de cuyo nombre no quiero acordarme...»), y este otro: «Platero es pequeño, peludo, suave, tan blando por fuera que se diría todo de algodón, que no lleva huesos...». Ambas, con las salvedades debidas y las diferencias que cualquiera puede ver o presumir, se basan en una conversación, o en una serie de conversaciones entre dos personajes. En el caso de *Platero*, una conversación más ensimismada¹¹, desde luego, pero conversación, a fin de cuentas.

Nada más salir a la calle, ambas alcanzaron una popularidad que debió sorprender a sus dos autores, y que no ha dejado de acrecentarse con el paso del tiempo. Y sin embargo ambas tuvieron unos orígenes «humildes»¹²: ninguna de las dos, sobre todo el *Quijote*, nació de un proyecto calculado en su totalidad, de principio a fin. Este fue probablemente alargado a requerimiento de su primer editor, a partir de un primer *Quijote* de seis capítulos, los iniciales, que lo asemejaban a una novela ejemplar. El editor, vistas las posibilidades del argumento, quería una obra mayor, jocosa, al gusto de la época. Y Cervantes le dio el *Quijote* de 1605 (el segundo aún tardaría en llegar más de diez años). *Platero* fue escrito mayormente durante la estancia de Juan Ramón en Moguer, tras abandonar Madrid, entre 1906 y 1912¹³, como un conjunto de recuerdos

¹⁰ J. Urrutia, *Introducción*, in J.R. Jiménez, *Platero y yo*, Madrid, Biblioteca Nueva, 1997, pp. 5-64; González Ródenas, Young, *Introducción*, cit.; A. Trapiello, *Prólogo: Platero o la breve historia de un libro feliz*, in J.R. Jiménez, *Platero y yo*, Madrid, Diario ABC, 2014 (pp. 2-14); J.A., Expósito, *Sendas paralelas de Platero y El Quijote*, in González Ródenas, Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, cit., pp. 311-327.

¹¹ González Ródenas, Young (*Introducción*, cit., p. 442) recogen, precisamente, la expresión «diálogo ensimismado» con la que Rosa Chacel se refiere a la relación entre Juan Ramón y Platero, y también las palabras de Federico de Onís (1922) al respecto, que abundan en la misma idea: «Cuando Juan Ramón razona con Platerillo nos parece que razona consigo mismo. [...] Es difícil entender que sean dos personas distintas. [...] Platero no es otro que el poeta mismo» (véase nota nº 19). I. Román, *La primera persona narrativa en Platero y yo*, in *Actas del Congreso Internacional Conmemorativo del Centenario de Juan Ramón Jiménez*, Huelva, Diputación Provincial de Huelva, Instituto de Estudios Onubenses, 1981.

¹² En una carta (1914) de Juan Ramón Jiménez a Zenobia (que se encuentra en el Archivo Carmen Hernández Pinzón) el poeta le escribe lo siguiente: «Querida Zenobia, antes, cuando volvía a casa, me encontré con el director de *La Lectura*. Hablando de la biblioteca (que ahora va a publicar) para niños, me rogó que hiciera alguna cosa a propósito. Yo había pensado hace meses darle *Elegía* en prosa que tengo escrita; unas escenas entre un asnucho y yo [...]» (González Ródenas y Young, *Introducción*, cit., p. 433).

¹³ En la edición completa de la Editorial Calleja (1917) se indica, bajo el título y entre paréntesis, «1907-1916», como periodo de composición de la obra, aunque «[...] es muy probable que gran parte del texto se preparara, o por lo menos se rematara y corrigiera, entre 1912 – fecha de su

de infancia en breves capítulos, compuestos, según el propio escritor, en pocos minutos. Más tarde aludiremos a las vicisitudes del primer *Platero*, el «Platero menor», ilustrado con dibujos de Fernando Marco que al poeta no le gustaron por su elementalidad, pero que a la postre resultaron ser prototípicos, como los grabados del francés Gustave Doré para la novela cervantina¹⁴. En cierto modo, ambas obras fueron compuestas a salto de mata a lo largo de los años, como agregación de cuadros o capítulos, sin un proyecto exhaustivamente premeditado desde un principio en el caso del *Quijote*, o como parte de otro proyecto mayor en el de *Platero*¹⁵. En realidad, tanto a una como a otra, se le podrían haber añadido o quitado capítulos sin que la historia hubiera sufrido un cambio profundo. Incluso, como sugiere Andrés Trapiello¹⁶, ambas pueden ser entendidas en su totalidad aunque se lean en versiones distintas e incompletas: su lectura siempre produce una sensación de unidad.

El *Quijote* tuvo una pronta y gran acogida, y sus personajes se hicieron enseguida famosos, pero sólo como una obra de entretenimiento, divertida, cómica. Pasaría mucho tiempo hasta que surgieran otros lectores y otras lecturas que descubrirían en la historia de este hidalgo manchego significados más hondos y universales, que en cierto modo se han vuelto canónicos y, con frecuencia, manidos, condicionando más allá de lo aceptable la relación del lector con el texto y su autor. A *Platero* aún no le ha llegado esa lectura, y sigue encadenado al estereotipo infantil con el que fue bautizado y con el que ya ha andado a cuestas un siglo.

Por supuesto, el *Quijote* y *Platero* han ocupado y ocupan un lugar de privilegio en la cultura escolar. Cada uno a su manera, cada uno a su ritmo. Pero ambos forman parte capital de la historia de la educación española, y de quienes la han vivido como maestros o como discípulos. El *Quijote* tardó en convertirse en un libro de lectura para niños. Su complejidad literaria animó a algunos a hacer «Quijotes» a la medida, es decir, adaptados a la infancia, aplicándole, a veces con cierto descuido y brusquedad, el cilicio didáctico: aligerando el texto, suprimiendo párrafos y capítulos, añadiendo ilustraciones atractivas, dándole, en suma, prioridad a la anécdota cómica, a la aventura disparatada más que a la conversación ingeniosa o al pasaje más reflexivo¹⁷. La primera edición adaptada del *Quijote* data de mediados del siglo XIX, y se debió al krausista Fernando de Castro. Después menudearían estas ediciones,

regreso a Madrid – y finales de 1914» (González Ródenas y Young, *Introducción*, cit., p. 432).

¹⁴ Trapiello, *Prólogo: Platero o la breve historia de un libro feliz*, cit.

¹⁵ González Ródenas, Young, *Introducción*, cit.

¹⁶ Trapiello, *Prólogo: Platero o la breve historia de un libro feliz*, cit.

¹⁷ J.C. González Faraco, *Arte, lenguaje y educación: apuntes para una crítica de la razón pedagógica en el Quijote*, «Revista de Educación», número extraordinario: *El Quijote y la Educación*, 2004, pp. 77-104; Id., *Il cavaliere errante. La poetica educativa di Don Chisciotte*, Milano, FrancoAngeli, 2008; Id., *Lecturas educativas del Quijote. Textos e iconografía escolar*, Madrid, Biblioteca Nueva, 2010.

especialmente a raíz del tercer centenario de la novela en 1905, cuando la simbología nacional del *Quijote* alcanzó su cima. Su lectura diaria en las escuelas fue primero oficialmente recomendada por el Ministerio de Instrucción Pública y, finalmente, en 1920, declarada obligatoria¹⁸. El caso de *Platero* es distinto, como veremos a continuación.

2. El *Platero* de 1914, ¿un libro para la infancia?

Puede que el primer *Platero* adaptado con un propósito expresamente didáctico fuera el conocido como «*Platero de Boston*», publicado en esta ciudad en 1922 y destinado a estudiantes norteamericanos de español¹⁹. Formaba parte de una colección de «Textos españoles contemporáneos», dirigida por Federico de Onís, profesor de Literatura Española en la Columbia University de Nueva York²⁰, en la que también figuraban obras de Benavente, Blasco Ibáñez, Azorín, Baroja, Martínez Sierra, los Quintero, Rubén Darío, Palacio Valdés, Concha Espina, además de varias antologías. Se trata de una versión abreviada e ilustrada de *Platero y yo*, editada por Gertude M. Walsh, con un total de 33 capítulos elegidos con criterio pedagógico de las ediciones de 1914 y 1917. Incluye un prefacio en inglés de Federico de Onís, en el que alude a la utilidad formativa de la obra, y a continuación una introducción en español, también suya, en la que escribe una calurosa y premonitoria semblanza de Juan Ramón Jiménez y su obra literaria, principalmente de *Platero*. Los capítulos, en los que a veces se aprecian ligeras modificaciones del texto original, van seguidos de una sucesión de ejercicios de comprensión lectora, gramática, vocabulario, traducción y redacción, con lo que cada uno, en cierto modo, se transforma en una lección. Este singular *Platero*, que oscila entre la antología de lecturas y el manual de lengua española, y en el que la obra literaria es a la vez texto y pretexto, acabará, sin embargo, convirtiéndose en uno de los libros de referencia para la enseñanza y el aprendizaje de español para extranjeros.

Además de ésta, podríamos considerar también como otra de las «ediciones adaptadas» más tempranas, aunque no sea en realidad un «*Platero*» aparte, la

¹⁸ N. Martín Rogero, *El uso del Quijote en el aula. Revisión histórica de ediciones escolares y paratextos didácticos*, «Ocnos», n. 3, 2007, pp. 77-90; A. Tiana, *Los libros de lectura extensiva y desarrollo lector como género didáctico. El Quijote en la escuela. Las gramáticas escolares*, in A. Escolano (dir.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 255-289; González Faraco, *Lecturas educativas del Quijote*, cit.

¹⁹ J.R. Jiménez, *Platero y yo*, Boston, D.C. Heath & Company Publishers, 1922, Edición de Gertrude M. Walsh, Introducción crítica a cargo de Federico de Onís.

²⁰ C. Naranjo Orovivo, *Federico de Onís, nexos de culturas: España, Estados Unidos, Puerto Rico*, «Boletín de la Institución Libre de Enseñanza», nn. 78-79-80, 1910, pp. 347-362.

que compondrían los 12 capítulos incluidos en el libro²¹ que su mujer, Zenobia Camprubí, publicó en 1932 con una selección de verso y prosa de Juan Ramón para niños. Pero, sin duda, como ya hemos señalado, si hay una edición para niños por antonomasia, ésa fue la primera. Así lo determinó una confluencia de azares que, aunque conocidos, no está de más recordar.

Esta edición apareció el 12 de diciembre de 1914 en *La Lectura*, una editorial creada sólo cuatro años antes. En principio, su producción estaba dividida en cinco colecciones, muy influidas por el espíritu de la Institución Libre de Enseñanza y los ideales de modernización cultural y reforma educativa de Giner de los Ríos²². En una de estas colecciones, *Ciencia y Educación* (1914-1930), y su aneja, la *Biblioteca de Juventud* (1914-1916), fue donde se publicó *Platero* con una tirada de 3000 ejemplares. El mismo día, no obstante, y a espaldas del poeta, el editor, Francisco Acebal, publicó otra edición de 5.000 ejemplares, con contenido idéntico al de la anterior, pero de peor calidad y más barata, bajo el epígrafe de *El Libro Escolar*. Abusando de la confianza de Juan Ramón Jiménez y sin que éste se percatara de ello, Acebal había añadido en el contrato del libro una cláusula con la cesión de los derechos de reproducción. Juan Ramón descubriría fortuitamente esta edición «escolar» (el «otro tú» de Platero, como él la llamaría)²³, y se indignaría sobremanera por el engaño de que había sido objeto, pero la legalidad estaba de parte del editor. Dejando al margen estos desdichados avatares, que en el futuro se repetirían con múltiples ediciones «pirata», el hecho es que, desde su misma aparición, *Platero* se vio explícitamente asociado con el público escolar.

Juan Ramón, a causa de las circunstancias imprevistas que iban a rodear la publicación del libro y sin tener la menor sospecha del éxito que iba a cosechar rápidamente, fue, en buena medida, cómplice activo de esa asociación. Cuando en su día el editor le había pedido una obra para iniciar la segunda serie de la colección de libros para niños que tenía entre manos, parece que Juan Ramón barajó momentáneamente la opción de una muestra de textos de *Platero*, en su mayor parte ya escritos, a los que no parecía atribuirles demasiado valor literario²⁴. Pero debió desistir de ello enseguida, pues ya tenía pensado publicar este libro como una de las Elegías Andaluzas en sus obras completas²⁵. Así que decidió ofrecerle otra obra también apropiada para la colección, *Crescent Moon* de Rabrindanth Tagore, traducida al español por Zenobia, con quien

²¹ J.R. Jiménez, *Poesía en prosa y verso (1902-1932) de Juan Ramón Jiménez, escogida para los niños por Zenobia Camprubí Aymar*, 1932, Madrid, Signo. Hay una edición facsímil, publicada por la Diputación Provincial de Huelva en 2006.

²² A. Marco García, *Francisco López Acebal y sus aportaciones a la cultura española del siglo XX*, «Archivum: Revista de la Facultad de Filología», nn. 46-47, 1997, pp. 303-325.

²³ M.J. Blanco, M.J. Gallinato, *El otro tú de Platero y yo. Dos miradas a la primera edición*, in González Ródenas y Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, cit., pp. 91-98.

²⁴ Véase el fragmento de la carta de Juan Ramón a Zenobia recogido en la nota 12.

²⁵ González Ródenas, Young, *Introducción*, cit., p. 433.

estaba iniciando su noviazgo, y por él mismo. Con los plazos cumplidos, apremiado por Acebal, y viendo que la traducción no avanzaba a causa de un distanciamiento temporal con su novia, Juan Ramón no vio otra salida que darle *Platero*²⁶. De esta manera accidental, apresurada y parcial, *vería el libro su primera luz* en una colección orientada exclusivamente al público infantil, lo que marcaría, en buena medida, su destino literario y su lectura.

No fue el editor (como Juan Ramón más tarde, contradiciéndose, diría, quizás dolido por el engaño sufrido o porque no le había gustado la edición de *La Lectura*) sino el mismo poeta quien se ocupó personalmente de seleccionar los contenidos de este *Platero*, para lo que contó con el juicio crítico de Zenobia²⁷. No obstante, viendo cómo su obra podía quedar encasillada como libro para niños, manifestó con claridad, en reiteradas ocasiones, que *Platero* no había sido escrito para un grupo lector tan concreto, sino tan sólo «escojido para los niños», lo que naturalmente no conjuraría el peligro de su encasillamiento. Este *Platero* “menor” de 63 capítulos fue todo un éxito editorial²⁸, con una magnífica acogida por parte de la crítica literaria y educativa, y se reeditará de forma continuada, siempre como libro para niños.

Muchos han visto en esta “elegía” la plasmación del espíritu y del ideal educativo del krausismo y la Institución Libre de Enseñanza, con la que Juan Ramón estuvo tan estrechamente ligado²⁹. Esta relación fue particularmente emotiva con su fundador Francisco Giner de los Ríos, el «andaluz de fuego»³⁰, como él lo llamó y a quien profesó admiración y devoción toda su vida. Giner fue el primer entusiasta de *Platero*, su primer valedor, el primero que vio en esa historia mucho de lo que había pensado y deseado para su pedagogía. Poco después de recibir el ejemplar que el poeta, nada más publicarse el libro, le había remitido, le escribe: «Gracias, querido amigo, por su ‘Elegía andaluza’. Desborda de intimidad y ternura, de sencillez tan exquisita... Es única»³¹. La escena de esos mismos días, contada por el propio Juan Ramón, de Don Francisco en su lecho de muerte, junto a un montón de ejemplares de

²⁶ *Ibid.* Véase también: S. González Ródenas, *Platero en mí. La huella de Platero en la vida de Juan Ramón Jiménez*, in González Ródenas, Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, cit., pp. 23-42.

²⁷ J.R. Jiménez, *Epistolario I (1898-1926)*. Madrid, Publicaciones de la Residencia de Estudiantes, 2006, p. 478; González Ródenas, Young, *Introducción*, cit., pp. 433-434.

²⁸ J. Guerrero Ruiz, *Juan Ramón de viva voz*, Valencia, Pre-Textos, 1999, p. 114.

²⁹ A. Gómez Yebra, *Introducción*, in J.R. Jiménez, *Platero y yo*, Madrid, Castalia (Castalia Didáctica), 1992, pp. 19-48; M.J. Domínguez Sío, *La pasión heroica: Don Francisco Giner de los Ríos y Juan Ramón Jiménez, dos vidas cumplidas*, Madrid, Los Libros de Fausto, 1994; M. J. Domínguez Sío, *Prólogo*, in J.R. Jiménez, *Un andaluz de fuego (Francisco Giner de los Ríos)*, Moguer, Huelva, Ediciones de la Fundación El Monte y la Fundación Juan Ramón Jiménez, 1998, pp. 14-108; M.A. Vázquez Medel, *Platero y yo de Juan Ramón Jiménez y el ideal educativo de Francisco Giner de los Ríos*, Sevilla, Universidad de Sevilla, 2014.

³⁰ Jiménez, *Un andaluz de fuego (Francisco Giner de los Ríos)*, cit.

³¹ A. Campoamor González, *Juan Ramón Jiménez y Zenobia Camprubí. Años españoles (1881-1936)*, Sevilla, Universidad Internacional de Andalucía, 2014, p. 415.

Platero, que estaba enviando a sus amigos como regalo de Navidad, no deja lugar a dudas. Giner, como recuerda Andrés Trapiello en una de las mejores introducciones al libro³², vislumbró en *Platero* las posibilidades que había para «un nuevo Quijote». Nada más y nada menos³³.

Platero no es un caso único, desde luego. ¿Hasta qué punto muchas obras clásicas son lecturas accesibles o aconsejables para niños? ¿Debieran ser expresamente concebidos o escritos para niños los libros que vayan a leer los niños? ¿Son recomendables y hasta qué punto lo son las adaptaciones escolares de obras mayores? Preguntas recurrentes, sin fácil respuesta, que además sugieren otras preguntas (qué es un clásico, por ejemplo) sobre las que han corrido ríos de tinta³⁴. Con el *Quijote* hubo en su momento (y no ha dejado de haber) debates al respecto, como el que mantuvieron, encendidamente, intelectuales de la época, como Ortega y Gasset³⁵. A *Platero*, como ya hemos apuntado, también lo ha acompañado, desde su primera edición en 1914, esta discusión, este dilema, sobre si es o no un libro para niños, aunque para el gran público la duda esté resuelta. Lo cierto es que, aunque no hubiera sido originalmente escrito para los niños, su primera edición fue expresamente concebida para ellos (como antes señalamos, el propio poeta lo sabía e hizo la selección de los 63 capítulos más apropiados), aunque muy probablemente no pensó que el libro quedaría definitivamente conceptualizado como libro infantil o juvenil, lo que le dio, como dijimos, inmediata notoriedad, pero también le granjeó críticas, algunas de ellas feroces y malintencionadas³⁶.

Juan Ramón se defendió como y cuanto pudo de ese estereotipo, como, por ejemplo, en el *Prologoillo al niño y al hombre de Poesía en prosa y verso escojida para los niños* (1932), donde reiteraba lo que había dicho con anterioridad, o sea, que en realidad no hay libros para tales o cuales grupos de lectores. Los libros, viene a decir, pueden ser leídos de muchas maneras, tienen muchas posibles lecturas, de mayor o menor densidad o calado:

³² Trapiello, *Platero o la breve historia de un libro feliz*, cit.

³³ A partir de la lectura de las *Meditaciones del Quijote* de Ortega (1914), Rosa Chacel ya había entrevisto en *Platero y yo* la posibilidad de que representara, en la España de comienzos del siglo XX, lo que ella llamó «una segunda primera novela», una especie de nuevo *Quijote*. En esa sombría etapa de la historia española, «lo que hacía falta era otro héroe que abarcara rasgos familiares y levemente tocado de *un ingenuismo adánico*». *Platero y yo*, a juicio de Rosa Chacel, cumplía esos requisitos (citada por González Ródenas y Young, *Introducción*, cit., p. 428). Véase también: M. Juliá, *Ecós de Platero en la prosa de Rosa Chacel*, in González Ródenas, Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, cit., pp. 291-309. Por otra parte, Richard Cardwell en su *Introducción*, in J.R. Jiménez, *Platero y yo*, Madrid, Espasa (Colección Austral), 16ª ed., 2013, p. 26, califica a *Platero* de «moderna novela ejemplar».

³⁴ P.C. Cerrillo, *Canon literario, canon escolar y canon oculto*, «Quaderns de Filologia. Estudis literaris», n. 18, 2013, pp. 17-31.

³⁵ González Faraco, *Lecturas educativas del Quijote*, cit., pp. 107-108.

³⁶ Urrutia, *Introducción*, cit. pp. 23-27; González Ródenas, Young, *Introducción*, cit., pp. 429-431.

El hombre, si es lo que puede, ‘esplicará’ suficientemente al niño un sentido difícil ‘relativo’. (Otras veces lo esplicará el niño al hombre.) En casos especiales, nada importa que el niño no lo entienda, no lo ‘comprenda’ todo. Basta que se tome el sentimiento profundo, que se contaje del acento, como se llena de la frescura del agua corriente, del color del sol y la fragancia de los árboles; árboles, sol, agua que ni el niño ni el hombre ni el poeta mismo entienden en último término lo que significan. La naturaleza no sabe ocultar nada al niño; él tomará de ella lo que le convenga, lo que ‘comprenda’. Pues lo mismo la poesía.

Es sabido que Juan Ramón mantuvo con *Platero* una relación ambivalente. Le había dado fama, e incluso llegó a decir que era, con el *Diario de un poeta recién casado*, su mejor obra. Pero le costaba aceptar que el público lo identificara en demasía con *Platero*, como si fuera autor de un solo libro, ensombreciendo o postergando de este modo su obra poética, tan diversa como inmensa. No sabemos qué pensaba de las versiones adaptadas ni de la representación de *Platero* en los manuales escolares, pero es de suponer que apreciara la popularidad que le daban a su libro³⁷, sobre todo entre los niños, y al mismo tiempo lamentara ciertas consecuencias de estos procesos de conversión de su creación en artefacto educativo y pedagógico-escolar, como, por ejemplo, al ser recogida fragmentariamente y no siempre con el esmero y el respeto debidos, dentro de una antología de lecturas o de un libro de historia de la literatura.

3. *Platero y yo en los manuales escolares españoles del siglo XX*

Podemos partir del hecho indiscutible de que una gran parte de los lectores de *Platero* ha conocido el libro en su infancia a través de sus adaptaciones y especialmente a través de sus lecturas escolares en diversos tipos de manuales, en los que los textos suelen verse cortejados por imágenes relativamente tópicas y ejercicios didácticos. Pero antes de proseguir con nuestro análisis, detengámonos brevemente en estos objetos tan distintivos de la cultura material de la escuela.

Con pocas palabras, Escolano³⁸ los caracteriza de este modo en la introducción a la que, por el momento, es la más completa historia del libro escolar en España:

³⁷ De hecho, Juan Ramón Jiménez guardaba en su biblioteca personal, parte de la cual se conserva y custodia en su Casa-Museo de Moguer, algún que otro manual escolar en el que había textos suyos y que, seguramente, le había enviado la editorial. En concreto, el libro de A. Fernández Rodríguez, *Cordialidades. Antología lírica infantil*, Barcelona, Salvatella, 1935, 2ª ed., con ilustraciones de Fernández Collado.

³⁸ A. Escolano Benito, *Introducción*, in Id. (dir.), *Historia ilustrada del libro escolar en España: del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, p. 15.

Los manuales son fuentes imprescindibles para desvelar algunos ‘silencios’ de la intrahistoria de la escuela, es decir, de las claves internas que pueden elucidar la ‘gramática’ que ordena la vida de la institución educativa. Ellos son un *espacio de memoria* en el que se han objetivado, al mismo tiempo, los programas de la cultura escolar de cada época, las imágenes dominantes en la sociedad que los ha producido y utilizado y los modos de apropiación de las disciplinas académicas.

En efecto, el manual es al mismo tiempo, valiéndonos de las expresiones del propio Escolano, *soporte curricular* del conocimiento que se transmite, *espejo de la sociedad* que lo produce y testimonio de los modos y modelos pedagógicos, la *ratio didáctica*, de un tiempo. El manual es, en suma, un dispositivo crucial de la traducción pedagógica, un prisma de cristal a través del cual construimos buena parte del conocimiento escolar y observamos el mundo, al menos desde que adquirimos la condición de alumnos en el seno de los sistemas escolares modernos³⁹. Ahora bien, como artefacto significativo de la vida escolar está sujeto a la experiencia cultural de la escuela⁴⁰. De ahí la conveniencia de no sólo considerar el manual en sí, sino también la de tener en cuenta sus contextos de transmisión y recepción, es decir, su papel, significado y uso en la práctica escolar, una perspectiva de sumo interés para el desarrollo de la investigación sobre la manualística⁴¹. En ese sentido son especialmente esclarecedores los trabajos etnohistóricos basados, por ejemplo, en autobiografías, diarios o cuadernos escolares, aun contando con las limitaciones que pueda tener este tipo de materiales⁴².

La preeminencia del manual en la vida de las escuelas ha llegado a ser tal que acabó por convertirse en una de las dianas predilectas de la crítica pedagógica contemporánea: para muchos encarnaba los males crónicos de la escolaridad tradicional (se la calificaba de “libresca”) y condicionaba exageradamente la docencia, hasta el punto de maniatarla. Todo indica, sin embargo, que, pese a estas críticas, el manual ha logrado conservar su estatus privilegiado en el medio escolar, si bien adoptando notorias innovaciones en su diseño y en su contenido y, en muchos casos, dejando de ser una herramienta didáctica insustituible.

Para este estudio hemos revisado y cotejado un total de 3.114 manuales⁴³, que ofrecen una vasta panorámica y una información abundante sobre los

³⁹ *Ibid.*

⁴⁰ Id., *La cultura empírica della scuola. Esperienza, memoria, archeologia*, Ferrara, Volta la Carta, 2016.

⁴¹ E.B. Johnsen, *Libros de texto en el calidoscopio. Estudio crítico de la literatura y la investigación sobre los textos escolares*, Barcelona, Pomares-Corredor, 1996; K. Mahamud, A.M. Badanelli, *Los contextos de transmisión y recepción de los manuales escolares: una vía de perfeccionamiento metodológico en manualística*, «Historia da Educação», vol. 20, n. 50, 2016, pp. 29-48.

⁴² A.M. Badanelli, K. Mahamud, *Posibilidades y limitaciones del cuaderno escolar como material curricular. Un estudio de caso*, «Avances en Supervisión educativa», n. 6, 2007, pp. 1-16; B. Martín Fraile, I. Ramos Ruiz, *La historia contada de los cuadernos escolares*, Madrid, Los Libros de la Catarata, 2015.

⁴³ La práctica totalidad es estos libros proceden de los tres fondos bibliográficos de que dispone

textos literarios preferidos por los autores y editoriales en distintos momentos históricos, desde 1915 hasta 2015. Se han seleccionado, analizado y comparado los fragmentos de *Platero y yo* que aparecen en estos libros, principalmente antologías o selecciones de lecturas para distintas edades. Es relativamente corriente, como ya hemos indicado, que se combinen en las antologías y, sobre todo, en los manuales de lengua y literatura, fragmentos en prosa (mayormente de *Platero y yo*, aunque a veces también de otras elegías u otras obras) y poemas, en una gama limitada, basada en la conveniencia pedagógica. Es decir, la que recoge los más comprensibles para niños y adolescentes, tanto por su contenido como por su léxico. Estos textos se utilizan asidua y explícitamente para ejercicios de lectura y conseguir así distintos objetivos: la comprensión del texto, el aprendizaje de vocabulario, de gramática, la sensibilización ante la belleza, etc., como, por otra parte, es habitual en estos manuales. Y es muy común que se suela aludir a *Platero y yo* como ejemplo, por antonomasia, de poesía en prosa, lo que, a juicio de algunos críticos, ha sido un error continuado. Platero, según Jorge Urrutia⁴⁴, sería uno de los pocos libros que cabría calificar de «relato poético» en la literatura española, junto a *Ocnos* de Luis Cernuda, *La Rambla* de Carmen Conde, *Alfanhú* de Rafael Sánchez Ferlosio, y quizás también, en nuestra opinión, *Las cosas del campo* de José Antonio Muñoz Rojas.

Vamos ahora a describir, con una serie de notas sucesivas ilustradas con casos más o menos prototípicos, la que podríamos denominar «versión escolarizada» de *Platero*. Por un lado, estas notas se refieren al perfil de los textos seleccionados con preferencia, es decir, al contenido de los capítulos o párrafos elegidos con mayor frecuencia, a fin de determinar qué imagen del libro transmiten al lector. Por otro, hacen alusión a su presentación formal dentro del manual y a la funcionalidad que persiguen, es decir, a su formato didáctico. Naturalmente, la selección de los textos y de su acompañamiento paratextual son caras de la misma moneda, en el sentido de que constituyen partes indisolubles de la traducción pedagógica de la obra:

a. *Representación muy reducida de la obra*

A pesar del volumen tan sustantivo de manuales seleccionados que contienen textos de *Platero y yo* (unos 250) y del extenso periodo que ha quedado definido (1916-2015), cien años de la historia escolar de España, el número de capítulos diferentes, reproducidos total o parcialmente, es de unos cincuenta. Esta cifra, en el primer periodo considerado (1916-1969), no pasa de la treintena. Si tenemos en cuenta que el *Platero* de 1914 (la versión “menor”, publicada por La Lectura), contiene 63 capítulos y la de 1917 (la versión “completa”, de la Editorial Calleja) 138, la primera constatación es que la obra está parcial,

el Centro Internacional de la Cultura Escolar (CEINCE), sito en Berlanga de Duero, Soria, España <<http://www.ceince.eu/>>.

⁴⁴ Urrutia, *Introducción*, cit. pp. 22-23

muy parcialmente representada en los manuales. Dos tercios de los capítulos de Platero no aparecen nunca en los libros de texto, es decir, no existen a efectos escolares. Una segunda constatación concierne a la frecuencia de aparición de cada uno de esos capítulos, y de nuevo nos encontramos, y ahora con mayor énfasis si cabe, ante una representación aún más escueta de la obra. Sólo un capítulo, el inicial, que describe a Platero, alcanza una presencia llamativamente alta. En orden decreciente le sigue un pequeño grupo de unos 10 capítulos con una frecuencia baja (entre un 75% y un 80% menos que el primero) aunque *suficientemente significativa*. Son los siguientes: *Alegría*, *Golondrinas*, *La flor del camino*, *La carretilla*, *La púa*, *Ángelus*, *El canario se muere*, *La niña chica*, *Primavera* y *Susto*. A este grupo le sigue otro similar en unidades, pero con muy pocas apariciones, por tanto escasamente significativas (entre ellos, *El pozo*, *Juegos del anochecer*, *La muerte*, *La corona de perejil*, *Carnaval*, etc.). El cuadro se completa finalmente con una treintena de capítulos citados esporádicamente.

Conviene asimismo apuntar que los autores de los manuales, aunque *Platero* había empezado a leerse en las escuelas poco después de su aparición y significativamente más en la siguiente década, se hicieron eco de la obra tardíamente, en la segunda mitad de los años veinte. Desde entonces, aunque con intensidad muy variable⁴⁵, no dejarían nunca de utilizarla como referencia y material para el aprendizaje de la lectura y para otros fines educativos.

b. *Una visión muy sesgada y parcial del contenido del libro*

Centremos la atención en aquellos capítulos más frecuentemente representados en los manuales escolares a lo largo del siglo que ha transcurrido desde que se publicó *Platero y yo*. Acabamos de decir que sólo hemos hallado cincuenta capítulos diferentes y que sólo un capítulo puede decirse que tiene una cuota de presencia alta: el primero, que se titula precisamente *Platero*. Un capítulo que muchas personas podrían recitar de memoria, al menos su párrafo inicial, y que es, sin duda, el más conocido y puede que el único que muchos lectores recuerden e incluso el único que hayan leído. Si ya es grave que un poeta del calibre de Juan Ramón Jiménez, con una obra poética tan excepcional, influyente y amplia, sea fundamentalmente conocido por un solo libro, más injusto aún es que sólo lo sea por un capítulo de ese libro. Juan Ramón comparte esa desdicha con Cervantes, y con otros escritores.

⁴⁵ En nuestro estudio, como hemos indicado, las primeras apariciones, aún muy ocasionales, de *Platero y yo* que hemos podido registrar en los manuales escolares, corresponden a finales de los años veinte. Durante la II República su presencia en los libros escolares crece claramente, sin ser generalizada, y se mantiene, aunque irregularmente y con una relevancia limitada, durante la posguerra, entre 1939 y 1955, para dispararse en la segunda mitad de la década de los cincuenta a raíz de la concesión del Premio Nobel de Literatura a Juan Ramón Jiménez en 1956. Sin embargo, en las últimas décadas, desde finales del siglo XX hasta la actualidad, mientras la obra poética de Juan Ramón ganaba justamente espacio y representatividad en los libros de texto, los fragmentos de *Platero* se han ido haciendo menos frecuentes, aunque, por supuesto, sigue siendo una obra popular, pero algo menos que durante buena parte del siglo XX.

Además del capítulo I, hemos identificado un grupo de capítulos aceptablemente representados, por su frecuencia, en los libros de texto. Consideremos ese total de diez capítulos y examinemos su contenido, para ver si encontramos algunas coincidencias apreciables. La primera (y este hecho no es casual) es que la mayoría de ellos se desarrollan durante la primavera, a pesar de que el relato está proporcionalmente dividido entre las cuatro estaciones del año. Naturalmente, la primavera ofrece al poeta ocasiones sin cuento para cantar a la naturaleza en su apogeo de formas, luces y colores, en su vitalidad suprema. La segunda (y tampoco se trata de una casualidad) es que en la mayoría de estos capítulos domina la alegría. El dolor está poco representado (por ejemplo, en *La niña chica*”, o incluso en *El canario se muere*), y además lo está contenida, serenamente, sin sombra de desesperación. Una niña que muere y va «camino de la gloria»; un pájaro que habitará «el paraíso de los pájaros». En varios de los capítulos apenas hay historia, tan sólo un cuadro «franciscano» de hermosas imágenes, y contemplación emocionada del campo. En otros, en la mayoría, los protagonistas son los niños y los animales (Platero, sobre todo), en escenas en las que destacan el juego feliz, la ternura y la compasión.

Llama la atención la ausencia casi absoluta de capítulos –y son muy numerosos en el original– en los que queda de manifiesto la resuelta inconformidad del poeta con la injusticia, con la hipocresía de las convenciones sociales y con la crueldad humana; u otros, en los que el misterio acechante, el sufrimiento y la tragedia más descarnada forman parte de la cotidianidad. Recuérdense capítulos como *La miga*, *Judas*, *El loro*, *Los gallos*, *Asnografía*, *La yegua blanca*, *Los húngaros*, *Mariposas blancas*, entre otros. El cuadro que resulta de las elecciones preferentes de los autores de los manuales es, por ello, extraordinariamente sesgado. *Platero* es, entre otras muchas cosas, un libro que contiene grandes valores etnográficos, pues retrata la vida de un pueblo andaluz en un determinado periodo de tiempo, con su fisonomía rural, sus personajes, su ambiente social y sus rasgos culturales. Juan Ramón era, entre otras muchas cosas, un gran observador, con capacidad admirable para penetrar en la realidad vivida y recordada. Poco, muy poco, de toda esa riqueza está recogida y acogida en los manuales escolares y, en general, en las lecturas de que ha sido objeto *Platero* a lo largo de su historia. Pocos son los que han leído el libro completo, y pocos también los lectores que, desprendiéndose de etiquetas, estereotipos y prejuicios, han caído en la cuenta de la complejidad, densidad y hondura del significado de la obra. Que haya sido normalmente destinada a la infancia y a la lectura escolar, tiene alguna responsabilidad en ello.

c. *Un libro dirigido preferentemente a un grupo lector muy específico*

En efecto, acabamos de reiterarlo, el devenir de *Platero y yo* ha sido condicionado e incluso sellado por su valoración como libro para niños, sin importar que su autor repitiera hasta la saciedad que no lo había escrito para un público tan específico. Más aún: cualquiera puede darse cuenta de que se trata de un libro de una profundidad semántica y de una dificultad estilística en su

aparente sencillez, que lo hacen de difícil comprensión para lectores inmaduros. El capítulo I puede inducir a error. De hecho induce a error, pues sugiere una imagen que no se corresponde en absoluto con los muy diversos registros que contiene, capítulo a capítulo, el libro. En todo caso, es un libro para adultos que pueden leer los niños, como, en cierto modo, el propio Juan Ramón insinuó⁴⁶. Su temprana, pródiga y próspera escolarización, como lectura, si no obligatoria, sí usual y típica en las escuelas ha contribuido, como decíamos antes, a todo lo contrario. Es decir, a que *Platero* sea un libro para niños que rara vez se lee en la edad adulta. Claro está que tal incongruencia le sucede también a otros clásicos, no tanto por padecer esa imagen infantil, sino por haber sido una lectura prescrita durante el tiempo escolar, lo que lamentablemente los condena a no ser leídos o a ser poco leídos más tarde por puro placer. En otras palabras, pueden verse conminados a una lectura perennemente inmadura. «Claro que esta aberración – escribía Rosa Chacel⁴⁷ – es mucho más judicial para los niños que para la literatura».

Los autores de los manuales escolares, como por ejemplo Lorenzo Luzuriaga, recuerdan de vez en cuando que *Platero* es un libro de los más recomendables «para lectura de los niños»⁴⁸. Otros lo creen más adecuado para la adolescencia⁴⁹. Pero la tónica es que lo prefieran como lectura especialmente propicia para neolectores y, en general, para la Educación Primaria o, cuando más, para los primeros cursos de la Secundaria. Estamos, pues, ante otra visión reducida de la obra, que no es absoluta pero sí común y palmaria. Esta vez la concierne a la edad y al grado de madurez de sus potenciales lectores, y se percibe también claramente en las imágenes asociadas a los textos.

No es casual que *Platero* (su entendimiento, su simbolismo), como otras obras clásicas, se vea a menudo preso de su particular presentación iconográfica, tan copiosa como reiterativa. *Platero* es, en términos generales, un libro más visto o «imaginado» que leído, a consecuencia de la sobreabundancia de cierto género de ilustraciones que han solido acompañar a la obra en su versión completa o en la que, en fragmentos, recogen típicamente los manuales escolares. *Platero* es casi siempre el protagonista de estas imágenes que, durante décadas pero sobre todo a partir de los años sesenta⁵⁰, se alimentan de la que ofrecen los primeros

⁴⁶ Esta insinuación es manifiesta en el prólogo o *Advertencia a los hombres que lean este libro para niños* de la edición de 1914. Escribe Juan Ramón: «Este breve libro, en donde la alegría y la pena son gemelas, cual las orejas de *Platero*, estaba escrito para... ¡qué sé yo para quién!... para quien escribimos los poetas líricos... Ahora que va a los niños, no le quito ni le pongo una coma. ¡Qué bien!».

⁴⁷ González Ródenas, Young, *Introducción*, cit., p. 435.

⁴⁸ L. Luzuriaga, *El libro del idioma. Lecturas literaria*, Barcelona, I. G. Seix y Barral Hnos, 1934.

⁴⁹ J.M. Borrás, *¿Qué debo leer? Guía de lecturas para hombres, mujeres y niños*. Barcelona, Sociedad General de Publicaciones, 1931.

⁵⁰ Las ilustraciones son muy infrecuentes en los años veinte y treinta, igualmente escasas en los cuarenta y cincuenta, salvo en contadas ediciones en las que suele aparecer alguna imagen del propio poeta y también, aunque menos, de *Platero* a una sola tinta. Avanzados los cincuenta,

párrafos del primer capítulo, intensificándola, incluso caricaturizándola, hasta el punto de mostrarlo más como un juguete inanimado o un simple personaje de *cartoon*⁵¹, que como un sujeto vivo y real, singular y rico en matices. Por desgracia, esta tendencia a infantilizar y a simplificar todavía más el libro sometiéndolo a esta representación banal y tópica, se resiste a desaparecer, salvo en algunas ediciones⁵² recientes en las que los ilustradores comienzan a desprenderse de los estereotipos iconográficos, que tanto han ayudado a encorsetar y, en cierta medida, a predeterminedar la lectura del libro, a semejanza de lo que le ha sucedido al *Quijote* durante mucho tiempo⁵³.

d. *Frecuente empleo instrumental de los textos de la obra*

Cuando los capítulos o determinados fragmentos de *Platero y yo*, como los de cualquier otra obra creativa, son extraídos del libro para ser utilizados como materia de aprendizaje escolar y cumplir una supuesta función educativa, cambian necesariamente de materialidad y de significado. Dejan de obedecer primordialmente a una razón literaria para atenerse, en buena medida, a una razón preferentemente tecnológica. Es decir, adquieren una funcionalidad pedagógica normalmente prescrita, dentro de un contexto ajeno y relativamente impropio, como es la cultura escolar o como es uno de sus dispositivos más genuinos, el manual.

Dependiendo del tipo de manual y de la función específica que se le asigne al texto, su narratividad, es decir, su condición literaria, se verá más o menos alterada o desatendida. Como aludimos con anterioridad, nuestra investigación se ha nutrido de varios tipos de manuales, aunque principalmente de tres. En el primero de ellos, los libros de lectura, prima la razón narrativa, puesto que

comienzan a ser algo más usuales, con una e incluso con dos tintas, para volverse mucho más comunes, variadas y coloridas a partir de la década siguiente y más aún a partir de los años setenta del siglo XX.

⁵¹ Véanse algunos ejemplos de libros de texto, entre otros muchos posibles, en los que se pueden hallar distintos modelos y estilos iconográficos de *Platero y yo*:

- *Lengua española y literatura. Primer curso de Bachillerato*, Textos E.P. Madrid, Compañía Bibliográfica Española S.A., 1959, p. 197.

- *Lecturas Escolares. Grado segundo*, Madrid, Compañía bibliográfica Española, 5ª ed. 1961.

- A. Álvarez, C. Herrero, *Lecturas escolares 5º curso*, Valladolid, Miñón, 1969, p. 7. Ilustraciones de Aguilar, Santana, Aguirre y Sinovas.

- C. Pedrosa, M. Ramiro, *Lenguaje 5º*, Madrid, Ediciones SM., 1971, p. 171.

- B. Bilbao, *Lecturas comentadas. 3º curso EGB*, Burgos, Santiago Rodríguez, 1974, pp. 100-101, 11º ed., Ilustraciones de C. Soravilla.

- F. Lázaro Carreter, *Teoría y práctica de la lengua. Libro de consulta y ejercicios colectivos. 7º EGB*, Madrid, Anaya, 1976, p. 163.

- G. Roldán (dir.), *Senda 6. Libro de lectura. EGB*, Madrid, Santillana, 1983. Ilustraciones de F. Bellver, J. Navarro y L. Rodríguez.

- F. Lázaro Carreter, *Curso de Lengua. 8º de EGB*, Madrid, Anaya, 1987, p. 213.

⁵² Es el caso, por ejemplo, de la edición de Castalia (Fuente), de 2014, ilustrada por Edgardo Solas.

⁵³ González Faraco, *Lecturas educativas del Quijote. Textos e iconografía escolar*, cit., pp. 153-171.

lo que cuenta es el texto en sí, en tanto que relato que se lee y, si es posible, se disfruta. Ahora bien, no es raro que el texto se vea cortejado y, por ello, subordinado a una serie de pautas didácticas de lectura⁵⁴ que, dependiendo de sus características y requerimientos, podrán contribuir a una mejor comprensión y deleite del texto o bien a condicionar en exceso al lector, como sucede frecuentemente con los ejercicios disciplinarios de comentario de texto. Hay incontables ejemplos de capítulos de *Platero* sometidos a una u otra lógica en los manuales de este género. En los libros de texto de lengua, en cambio, la narratividad queda en un segundo plano a favor de la explotación didáctica para el aprendizaje de la fonología o la gramática⁵⁵. De igual modo sucede en los manuales de literatura, donde priman, tal vez más habitualmente de lo aconsejable, el sentido disciplinar e histórico (incluso historicista) y el estudio formal (incluso formalista) de los textos.

Esta objetivación de la obra creativa la aparta de la experiencia lectora que ha de ser necesariamente subjetiva. En general, la tendencia normalizadora de la enseñanza escolar pone trabas a la singularidad del aprendizaje y, por tanto, no es sensible al acontecimiento de la lectura. En las enciclopedias, por ejemplo, a la fuerza sintéticas, los textos se ven ineludiblemente restringidos a pocas líneas y se les exige además una cierta multifuncionalidad⁵⁶. En el extremo opuesto a este estilo constreñido de operar con los textos, se situarían las actividades lectoras que, sin renunciar a un cierto aparato didáctico, buscan ante todo el gozo de la lectura y, en suma, la educación literaria de niños y adolescentes. En este extremo el testimonio y el arte del maestro son esenciales.

Así pues, podemos decir que el *Platero* que ha ido a la escuela (adonde Juan Ramón le prometió que nunca lo llevaría⁵⁷), ha sido víctima, como otras tantas criaturas de la literatura universal, de ciertas prácticas distintivamente académicas y, particularmente, pedagógicas: su relato se ha visto reinterpretado interesadamente para que cumpla una función en apariencia educativa, hasta el punto de que se le ha impuesto a veces un significado completamente distinto al que tenía originalmente; ha cumplido fines espurios, de uno u otro cariz, según la conveniencia y la elección, a veces arbitraria, de un autor o un editor, o al socaire de una particular circunstancia histórica⁵⁸; y ha sido empleado con fines

⁵⁴ Valga como ejemplo este manual: B. Bilbao, *Lecturas comentadas* (vol. 1, 8 años). Burgos, Hijos de Santiago Rodríguez, 1965, pp. 100-102, con varios capítulos de *Platero*, seguidos de un breve vocabulario y un cuestionario de comprensión lectora.

⁵⁵ Por ejemplo, *Curso de Lengua. 8º EGB*, Madrid, Anaya, 1987, p. 213, que incluye el capítulo *La niña chica*, acompañado de un elemental dibujo de Platero y una niña jugando a sus pies, y una columna adyacente de ejercicios de léxico, morfología y recursos estilísticos.

⁵⁶ Por ejemplo, *Nueva Enciclopedia escolar. Segundo Grado*, Burgos, Hijos de Santiago Rodríguez, 1950, p. 168, con un párrafo del capítulo primero en el que el alumno debe identificar adjetivos y adverbios.

⁵⁷ Léase el capítulo VI, *La miga*, rarísimamente recogido por los manuales escolares.

⁵⁸ H. Martens, J. Soto Vázquez, *La ideología franquista en clase de Lengua y Literatura: el caso de Adolfo Maíllo*, «Ocnos», n. 8, 2012, pp. 49-56.

didácticos, según criterios académicos (de los que su autor no era precisamente un entusiasta⁵⁹). En suma, se le ha degradado o incluso hurtado su sentido literario. A la postre, tales maniobras lo han textualmente encarcelado en la infancia y lo han institucionalizado como libro de escuela. Al menos ésa es la percepción de una mayoría para la que *Platero* representa sólo un recuerdo lejano y dulzón de la niñez, como *Alice*, *Pinocchio* o *Le Petit Prince*. Libros y personajes, como decíamos, más vistos o imaginados que leídos.

Consideraciones finale

Platero y yo gozó de un éxito inmediato nada más ser publicado en su primera versión, el «Platero menor». Como tal fue generalmente bien recibido tanto por la crítica literaria como por la específicamente educativa. Había aparecido, como es sabido, en dos ediciones simultáneas de la misma editorial: una más cuidada, con cubierta floreada e ilustraciones interiores, y otra más austera pero mayor y más barata, bajo el título *El Libro Escolar*. En cierto modo, este título presagiaría su porvenir. Pero quien quizás lo auspició fue Giner de los Ríos, fundador y alma de la Institución Libre de Enseñanza, quien, moribundo ya, celebró con entusiasmo el nacimiento del libro, intuyendo claramente sus extraordinarios valores literarios y educativos, y le dedicó los primeros elogios. Viniendo de quien venían debieron beneficiar mucho su difusión y que en poco tiempo fuera adoptado como libro común de lectura escolar en España. En 1917 Juan Ramón Jiménez publicó en la editorial Calleja la versión completa de *Platero*, la que habría de ser la versión definitiva, que, como era su costumbre, revisaría y corregiría hasta el final de su vida⁶⁰, aunque nunca llegaría a publicar una nueva edición revisada. *Platero* seguiría reeditándose en España y en América, y a partir de la segunda mitad de los años veinte algunas de sus páginas irían entrando en los manuales escolares para habitarlos ya por siempre, llegando a ser, muy probablemente, el libro de la literatura en español más escolarizado de todos los tiempos.

Este hecho ha marcado su destino. Ha influido decisivamente en el significado y la imagen de *Platero y yo* como clásico de la literatura, y ha tenido consecuencias evidentes en las lecturas de que ha sido objeto en estos cien años transcurridos desde sus dos primeras ediciones. La representación educativa del libro ha sustituido, hasta un cierto punto, su condición artística nativa, como una segunda piel que la oculta o la enturbia, cual una veladura que no deja ver con nitidez la verdadera naturaleza de lo que hay detrás. En la fabricación de esta representación, fruto de operaciones pedagógicas de diverso género y alcance,

⁵⁹ Léase el capítulo LV, *Asnografía*, nunca, que sepamos, presente en los manuales.

⁶⁰ R. Gullón, «*Platero*» *revivido*, Madrid, 1960.

entran en juego dos lógicas, dos sistemas de razón antagonistas. Uno, narrativo; otro, tecnológico. Si el primero se rige por la apertura a lo desconocido y la gratuidad de los actos, el segundo es prescriptivo y busca la utilidad. Si éste tiene como propósito la normalización de los aprendizajes, aquél en cambio prefiere el acontecimiento, que es singular y subjetivo (pues carece de objetivo, que viene de objeto).

Cuando a una obra creativa (al mundo de la vida, en otros términos) se le aplica una razón predominantemente tecnológica, la obra, como la vida, palidece, se somete a un discurso que, en cierto modo, la conmina a convertirse en objeto, en herramienta, y en mecanismo de persuasión. Al objetivar el texto, lo separa del lector, quien lo mira como algo ajeno. Sin embargo, si alguna meta tiene la lectura, ésta debiera ser la reescritura del texto, su perpetua reencarnación en cada lector, especialmente si hablamos de un clásico. Por contra, la lectura escolarizada, por lo que hemos podido ver y analizar en centenares de manuales, se inclina muchas veces, en esa pugna entre lógicas, hacia lo tecnológico, es decir, hacia lo académico y hacia lo didáctico, y en consecuencia hacia una lectura que posterga al lector en tanto que tal, y lo desvincula del texto. *Platero y yo*, leído en las escuelas, se ha vuelto otro libro, empuñecido y etiquetado, pretexto más que texto, un libro cautivo de un ritual previsible y acaparador que no lo deja respirar a sus anchas, que lo ancla en la infancia y lo vuelve distante y... distinto.

La radio per ragazzi nei primi anni del fascismo (1925-1933)

Carla Ghizzoni
Department of Pedagogy
Catholic University of Sacred Heart
in Milan (Italy)
carla.ghizzoni@unicatt.it

Radio for young people in the first years of Fascism (1925-1933)

ABSTRACT: While already widespread in several European countries and the United States at the beginning of the 1920s, radio broadcasts began in Italy in the autumn of 1924. The first radio station opened in Rome with many others soon following. To date, various studies have researched radio development and its use for propaganda and recreational purposes throughout the Fascist period. Also, it has been studied the role that radio broadcasts played during those years to create a mass Italian society. Despite radios being credited with shaping the Italian «collective memory» and the general appreciation of the important role played by radio in reaching out to all Italians (even those who were illiterate and thus unable to read books or newspapers), there is a certain lack of attention given to the medium of radio by scholars of the history of education. Researchers into the birth of Italian radio broadcasting have pointed out the interest in childhood and school. Yet, there are very few studies that have thoroughly investigated stages, features, protagonists of such subject. This essay plans to close this gap in knowledge by looking into the history of the first radio broadcasting meant for the Italian youth in the Fascist period, from their beginning in 1925 until 1933: the time period when the Mussolini government promoted the birth of the organization Ente Radio Rurale with the aim to reach out to as many Italians as possible. During this time period, each station still acted autonomously in their programming for youths, and the programs had much in common with other excellences in children's literature and journalism of the beginning of the 1920s even if Fascism was soon to pervade considerably all radio programming for younger audiences. The research has started with a review of the magazines used by Italian radio programmers to list all programs meant for the youths of the time and discover about their creators and their collaborators. We have analyzed all magazines published first by the Unione Radiofonica Italiana (URI) and then, from 1930, by the Ente Italiano Audizioni Radiofoniche (EIAR) such as the «Radiorario» (1925-1929), the «Radiocorriere» (from 1930), and the EIAR «Annuario». Similarly, we have also reviewed all books signed by those radio hosts who have left accounts, written texts and track lists for their programs meant for the Italian youths. **EET/TEE KEYWORDS:** History of education; Fascism; Tools of education; Italy; XXth Century.

Premessa

Dopo che tra il 1920 e il 1923 Inghilterra, Stati Uniti d'America, Francia, Germania, Danimarca e Cecoslovacchia già avevano creato stazioni radiofoniche¹, nell'autunno del 1924 anche l'Italia entrava nell'avventura del broadcasting. Tale ingresso avveniva per iniziativa dell'Unione Radiofonica Italiana (URI), una società che vedeva la partecipazione di diverse imprese, italiane e non, attive nel settore e che, per decisione dello Stato italiano, era unica concessionaria del servizio radiofonico². Il 6 ottobre del 1924 avevano inizio le trasmissioni dalla stazione di Roma con un concerto di musica classica; l'evento anticipava una tendenza, in quanto la musica, in specie classica, operistica o come selezione di canti dialettali e di arie popolari, fu la protagonista indiscussa di questa fase aurorale delle radiotrasmissioni in Italia. L'anno successivo, l'8 dicembre del 1925, era inaugurata anche la seconda stazione italiana, quella di Milano che si diede subito, rispetto a quella romana, un'organizzazione dei programmi più efficiente e più varia. Di lì a un anno, nel novembre del 1926 avviava le proprie trasmissioni la stazione di Napoli, mentre quella di Roma nel marzo di quello stesso anno era stata potenziata per assicurare una migliore ricezione. Quasi da subito, le stazioni menzionate destinarono uno spazio ai ragazzi, predisponendo appositi programmi per loro, in alcuni casi legati al mondo della scuola.

Relativamente all'impatto delle nuove tecnologie sull'evoluzione della società, è stato sottolineato come la diffusione della radio abbia costituito uno dei momenti più significativi della storia contemporanea. Per quanto riguarda l'Italia – ma l'osservazione va estesa anche agli altri Stati europei e non – essa

¹ La diffusione della radiofonia in alcuni di questi Paesi fu rapidissima, spinta in tal senso dalle società multinazionali e dalle imprese giornalistiche che stavano alla base delle diverse case radiofoniche. Si pensi che tra il 1922 e il 1924 furono erette più di mille stazioni in USA e gli apparecchi riceventi passarono da 100.000 a 1.500.000. In quegli stessi anni gli abbonati alla British Broadcasting Company salirono da 36.000 a 1.130.000 unità. Non da meno fu il successo della radiofonia in Germania dove, alla fine del 1924, gli utenti superavano il mezzo milione (A. Papa, *Storia politica della radio in Italia*, vol. 1: *Dalle origini agli anni della crisi economica 1924-1934*, Napoli, Guida, 1978, p. 7). In merito si vedano, fra gli altri, A. Briggs, *The history of broadcasting in the United Kingdom*, vol. 1: *The Birth of Broadcasting*, London, Oxford University Press, 1961; A. Goldfarb Marquis, *Written on the wind: The impact of Radio during the 1930s*, «Journal of Contemporary History», vol. 19, 1984, pp. 385-415; P. Scannel, D. Cardiff, *A Social History of British Broadcasting, 1: 1922-1939. Serving the Nation*, Oxford, Basil Blackwell, 1991.

² Sull'avvio della radio in Italia si vedano: P.V. Cannistraro, *La fabbrica del consenso. Fascismo e mass media*, Roma-Bari, Laterza, 1975, pp. 225-271; F. Monteleone, *La radio italiana nel periodo fascista. Studio e documenti 1922-1945*, Venezia, Marsilio, 1976; A. Papa, *Storia politica della radio in Italia*, Napoli, Guida, 1978, 2. voll.; A. Monticone, *Il fascismo al microfono. Radio e politica in Italia (1924-1945)*, Roma, Studium, 1978; G. Isola, *Abbassa la tua radio per favore... Storia dell'ascolto radiofonico nell'Italia fascista*, Firenze, La Nuova Italia, 1990; Id., *L'ha scritto la radio. Storia e testi della radio durante il fascismo (1924-1944)*, Milano, Bruno Mondadori, 1998; P. Ortoleva, *Linguaggi culturali via etere*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia Contemporanea*, vol. 2: *Una società di massa*, Bologna, il Mulino, 1993, pp. 441-488.

contribuì, a partire dal ventennio fascista, alla trasformazione del nostro Paese in una società di massa. La vita quotidiana, sia pure lentamente e specialmente nelle città, cominciò a organizzarsi attorno a alcuni momenti chiave, quali la partita domenicale, l'ascolto serale o alla domenica in famiglia della musica o della prosa, la pubblicità accompagnata da motivetti orecchiabili³.

A fronte di questo ruolo svolto dalla radio, potenzialmente in grado di raggiungere capillarmente tutte le case e di essere accessibile a tutti gli italiani, anche gli analfabeti, diversamente dal libro o dal giornale, va rilevata la scarsa attenzione degli studiosi di storia dell'educazione per questo mezzo di comunicazione che, al pari di altri, ha contribuito a costruire la «memoria collettiva» della nazione. Le ricerche sulla genesi della radiofonia italiana hanno segnalato l'interesse dedicato all'infanzia e alla scuola. Pochissimi però sono i contributi che hanno cercato di ricostruire in modo organico tappe, aspetti, protagonisti di questa vicenda⁴.

L'intento di questo saggio vuole essere quello di percorrere un tratto di questa storia, ovvero quella relativa al ventennio fascista, all'interno della quale si possono individuare due grandi momenti. Vi è una prima fase che va dalle origini, nel 1925, fino agli inizi degli anni Trenta, connotata da un'azione autonoma delle diverse stazioni della penisola nella programmazione per la fanciullezza. Ad essa segue un secondo periodo, che va dal 1933, anno in cui nasceva l'Ente Radio Rurale con lo scopo di portare la radio nelle campagne, fino alla caduta del fascismo. Questo momento vede due processi in atto tra loro strettamente legati: per un verso, il fascismo avviò una centralizzazione della programmazione della radio, a discapito delle specificità locali, per un altro esso si impegnò nella diffusione di questo strumento di comunicazione nella scuola come ausilio della didattica nelle realtà rurali e nella predisposizione di contenuti omogenei da mandare in onda simultaneamente in tutte le classi, da Nord a Sud, decisamente dominati dai temi propri dell'ideologia fascista.

Per ragioni di spazio, in questa sede ci si soffermerà sulla prima fase in cui si riscontra una continuità con le esperienze di letteratura e pubblicitaria per l'infanzia del primo ventennio del Novecento anche se, in modo via via più deciso, il fascismo pervadeva le trasmissioni per ragazzi. Al fine di fare luce su tali trasmissioni, la ricerca ha preso le mosse dalla stampa periodica espressione della radio per censire i programmi e fare emergere i nomi degli ideatori e dei collaboratori. Nello specifico sono state analizzate le riviste editate dall'URI, prima, e dall'Ente Italiano Audizioni Radiofoniche (EIAR) dopo, ovvero il

³ Si veda Isola, *L'ha scritto la radio. Storia e testi della radio durante il fascismo (1924-1944)*, cit., pp. XIII-XIV.

⁴ Si intende riferirsi a A. Mencarelli, *Radiobalilla. Le trasmissioni radiofoniche per ragazzi nel periodo fascista*, in M.C. Giuntella, I. Nardi (edd.), *Il bambino nella storia*, Napoli, Edizioni scientifiche italiane, 1993, pp. 211-233; S. Zambotti, *La scuola sintonizzata: pratiche di ascolto e immaginario tecnologico nei programmi dell'Ente Radio Rurale (1933-1940)*, Torino, Trauben, 2007.

«Radiorario: organo ufficiale della Unione radiofonica italiana» (1925-1929), il «Radiocorriere: settimanale dell'EIAR» (dal 1930), nonché l'«Annuario» dell'EIAR. Analoga attenzione è stata riservata alle pubblicazioni curate da alcuni degli ideatori dei programmi per ragazzi di questi anni, in cui, spesso, erano raccolti memorie, testi e tracce per le trasmissioni stesse.

1. *L'avvio delle trasmissioni per ragazzi dalle stazioni di Roma, Milano e Napoli*

Dal gennaio del 1925, dopo il segnale di inizio dei programmi del pomeriggio alle 16.45, la stazione di Roma riservava uno spazio per i fanciulli con la lettura di una novella per i bambini che dal febbraio assumeva il titolo molto generico di *Lecture per i bambini*⁵. La voce narrante era quella di una delle prime e più note annunciatrici della radio italiana degli esordi, ovvero Maria Luisa Boncompagni, conosciuta con lo pseudonimo di «Zia Radio»⁶. Il primo programma per l'infanzia nel nostro Paese con una struttura ben impostata, una progettualità e una continuità nella settimana, era mandato in onda dalla stazione di Milano di lì a un anno: il 4 gennaio 1926 aveva inizio *Il Cantuccio dei bambini*⁷, anticipato a dicembre del 1925, subito dopo l'inaugurazione della stazione stessa, dall'*Angolo dei Bambini*⁸.

Prima di procedere oltre nella presentazione di queste iniziative, vale la pena di prestare attenzione ai termini usati per indicare programmi e collaboratori di questa radio per i ragazzi. Il titolo del contenitore milanese, ad esempio, rappresentava l'adattamento italiano del fortunatissimo, per durata e audience,

⁵ Cfr. «Radio Orario: organo ufficiale della Unione radiofonica italiana» [d'ora in poi RO], a. I, n. 4, 31 gennaio 1925; n. 6, 21 febbraio 1925, dove è pubblicata la programmazione per quelle settimane.

⁶ Si veda la voce biografica a lei dedicata in P. Ortoleva, B. Scaramucci (edd.), *Enciclopedia della Radio*, Milano, Garzanti, 2003, p. 104. La stessa Boncompagni ha rievocato la fase pionieristica della programmazione radiofonica per ragazzi alla radio e ricordato i suoi protagonisti in un programma per la radio andato in onda nel 1975, di cui si può ascoltare la riproduzione sonora conservata nel Catalogo Multimediale delle Teche Rai (www.teche.rai.it): *Mezzo secolo della radio italiana, puntata n. 20 del 12/4/1975*, in *Teche Rai*, n. identificatore Teca Roma 605739 (ultimo accesso: 2/8/2018).

⁷ Cfr. RO, a. II, n. 1, 2 gennaio 1926, pp. 8-10.

⁸ Cfr. RO, a. I, n. 49, 17 dicembre 1925, pp. 8-9. L'idea di dare spazio ai programmi per ragazzi era presente fin dalla progettazione della stazione lombarda; si veda in merito quanto affermato da «Radio Orario», nel novembre del 1925: «È stabilito che i programmi avranno lo scopo di contribuire alla educazione del popolo, offrendogli l'opportunità di ascoltare della buona musica, conversazioni letterarie, letture scientifiche e quanto può essere utile nella vita giornaliera; vi saranno pure emissioni destinate specialmente ai bambini»: *Notizie Radio, ibid.*, a. I, n. 46, 28 novembre 1925, p. 3.

programma della BBC, *Children's Hour* trasmesso dalla fine del 1922⁹. Nella fase di avvio, esso non aveva una organizzazione precisa, ma si basava sulla capacità di improvvisazione di alcuni membri dello staff delle diverse stazioni, da subito noti ai piccoli ascoltatori come *Uncles* e *Aunties*, che intrattenevano i piccoli, a loro volta chiamati *nephews* e *nieces*, leggendo brevi poesie, favole, brani di libri e novelle e facendo ascoltare musica. Il titolo *Children's Hour*¹⁰ si impose nei mesi successivi presso le diverse stazioni della BBC, benché all'inizio i programmi per bambini avessero anche nomi diversi, il più diffuso dei quali era *Children's Corner*.

Di qui la traduzione letterale del programma *L'angolo dei bambini* della stazione milanese che poi lasciò lo spazio a *Il Cantuccio dei bambini*. Come gli speakers inglesi, i «dicitori» e le «dicitrici» italiani si facevano chiamare zie e zii. Oltre alla «Zia Radio» della stazione di Roma, anche *Il Cantuccio* milanese annoverava una «Zia Radio», autrice di alcuni degli articoli pubblicati dall'organo di stampa dell'URI, «Radioraio», e una «Zia Elena». Come si vedrà, le stazioni italiane non si limitarono all'uso dei termini zia e zio, adottati in Inghilterra e non solo¹¹, ma allargarono la ricerca di pseudonimi a tutto l'ambito familiare: a Roma la figura centrale nella programmazione era «Nonno Radio» e a Napoli la «Nonnina della Radio».

Le indagini sulla radio delle origini, interessate a mettere in relazione il nuovo mezzo di comunicazione con l'emergente società di massa e con gli scopi perseguiti dal fascismo, non hanno colto la peculiarità di questi pionieristici programmi della radio per i bambini i cui ideatori provenivano dal mondo della pubblicitaria per i ragazzi e che si riconoscevano nella nuova pedagogia che poneva l'accento sulla spontaneità del fanciullo, a sua volta espressione della scoperta dell'infanzia affermata nel mondo occidentale fra XIX e XX secolo. La letteratura sull'argomento ha inserito la nascita della radio in Italia nel processo di sviluppo della tecnologia applicata ai mezzi di comunicazione che, ai primi del '900, travalicava i confini nazionali e ha ben delineato le

⁹ Dopo il declino degli anni Cinquanta in seguito all'affermazione della televisione, *Children's Hour* non fu più mandato in onda dalla British Broadcasting Corporation (BBC) dal marzo del 1964. Oltre a A. Briggs, *The history of broadcasting in the United Kingdom*, 2 vols., London, Oxford University Press, 1961-1965, *passim*, si vedano W. Grevatt, *BBC Children's Hour. A celebration of those magical years*, Lewes, The Book Guild Ltd, 1988; J. Dolan, *Aunties and uncles: the BBC's children's hour and liminal concerns in the 1920s*, «Historical Journal of Film, Radio and Television», vol. 23, n. 4, 2003, pp. 329-339; S.G. Parker, *Teach them to pray Auntie: Children's Hour Prayers at the BBC, 1940-1961*, «History of Education», vol. 39, n. 5, 2010, pp. 659-676.

¹⁰ Il titolo *Children's hour* era tratto da un componimento di Henry Wadsworth Longfellow, che così recita: «Between the dark and the daylight/When the night is beginning to cower/Comes a pause in the day's occupation/That is known as the Children's hour»: Grevatt, *BBC children's hour*, cit., p. 21.

¹¹ Si veda in merito il recente contributo sull'esperienza della radio cecoslovacca: M. Hrickova, A. Kičková, *History of radio broadcasting for schools in the Czechoslovak Republic*, «History of Education & Children's Literature», vol. 13, n. 1, 2018, pp. 393-409.

analogie e le differenze con gli altri Paesi europei nonché le specificità rispetto all'impostazione statunitense, essa però non ha rilevato come, di fatto, l'avvio dei programmi per ragazzi in Italia si richiamasse a modelli sperimentati anche in altri Stati europei, innanzi tutto in Inghilterra dalla BBC.

Allo stato attuale delle ricerche non ho individuato memorie redatte dai primi protagonisti della radio per ragazzi in Italia relative alle iniziative avviate negli anni Venti che sottolineino il richiamo al modello inglese. Tuttavia tale legame vi era e trova ulteriore conferma in un'altra caratteristica della programmazione per fanciulli: dal 1923 le singole stazioni inglesi formarono dei *Radio Circles*. Si trattava di gruppi per i giovani ascoltatori che pagavano un'esile sottoscrizione che dava diritto a ricevere la tessera associativa e altri piccoli regali (ad esempio calendari) e a partecipare alle iniziative promosse, quali gite, ricevimenti per alcune festività (in specie il Natale). Oltre ovviamente a consolidare il legame fra la BBC e gli ascoltatori e, dunque le loro famiglie, i *Radio Circles* si prefiggevano di invitare i ragazzi a destinare parte del loro tempo alle opere di bene attive nella zona in cui risiedevano. Da segnalare, ad esempio, la raccolta di fondi per dotare di apparecchi radio gli ospedali, soprattutto con piccoli pazienti¹².

Anche in Italia, le diverse stazioni si curarono di istituire gruppi di ascolto fra i ragazzi, con il chiaro intento di legare i bambini alla radio e di creare uno spirito di corpo. Di queste iniziative si dirà meglio fra poco, illustrando i programmi promossi in questo periodo; basti qui ricordare, ad esempio, che l'avvio nel settembre del 1926 del *Giornale radiofonico del fanciullo* da parte della stazione di Roma, per volontà dell'insegnante Cesare Ferri, denominato «Nonno Radio», coincise con la creazione della «Nipoteria», che raccoglieva gli ascoltatori assidui nell'ascolto e nella corrispondenza con lo stesso «Nonno Radio». Anche in questo caso era prevista una tessera, ma non vi era un costo per l'associazione. Era a pagamento, invece, il rilascio del distintivo per chi lo voleva. Il criterio per essere accolti era la fedeltà nella partecipazione alle attività promosse dalla stazione radio romana (gare, gite, corrispondenza, opere di assistenza anche in questo caso per bambini malati) e proprio sulla base di questo criterio «Nonno Radio» individuava il gruppo dei «fedelissimi» tra gli ascoltatori¹³. Un'analoga iniziativa venne organizzata dalla Stazione di Napoli che, nel dicembre del 1926, avviava le trasmissioni per i più piccoli con *Bambinopoli* e istituiva una «Confederazione» fra i giovani che seguivano i programmi radio e il cui fine era quello di consolidare i rapporti fra ragazzi,

¹² Cfr. Briggs, *The history of broadcasting in the United Kingdom*, vol. 1: *The Birth of Broadcasting*, cit., pp. 258-262; Grevatt, *BBC children's hour*, cit., pp. 27-29.

¹³ Cfr. *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri. Bilancio del primo anno di vita*, RO, a. III, n. 47, 19 novembre 1927, pp. 9-10; *Statuto della Nipoteria*, *ibid.*, p. 10.

radio e famiglie, coinvolte a loro volta, se non altro, nell'accompagnamento dei figli alle attività di gruppo o alle audizioni presso la stazione radio¹⁴.

Come nel caso dei *Radio Circles* di *Children's Hour*, anche nei gruppi di ascolto italiani finalità ludiche si intrecciavano con scopi assistenziali e educativi, ma, a differenza dell'esperienza inglese, in Italia essi, sia pure con gradazioni diverse, tendevano a riflettere la progettualità politica del fascismo. Va peraltro notato come la costituzione di gruppi di ascolto e di partecipazione attiva alle trasmissioni radiofoniche da parte dei bambini non era frutto di semplice emulazione di una consuetudine straniera, ma si collegava a analoghe iniziative promosse da periodici per l'infanzia di successo sorti nel nostro Paese in età giolittiana. Si pensi alla «Confederazione giornalesca del girotondo» lanciata nel 1908 da «Il Giornalino della Domenica» di Luigi Bertelli¹⁵ o al coinvolgimento dei giovani lettori del «Corriere dei piccoli» nell'attività benefica di costituzione di piccole biblioteche regalate alle scuole rurali, che, più di altre, nella disomogenea, ma comunque non ricca, Italia scolastica di inizio Novecento, potevano svolgere un'importante funzione a favore della promozione della lettura fra piccoli e grandi¹⁶.

Si avrà modo di tornare su questi intrecci fra carta stampata e onde radio nella messa a punto di proposte di svago per ragazzi negli anni Venti. Merita al momento soffermarsi ancora un attimo sulle ragioni delle contiguità fra le prime esperienze italiane di radiofonia per ragazzi e quelle inglesi. Nonostante il differente contesto politico, credo che esse debbano essere ricondotte alle caratteristiche stesse del mezzo di comunicazione. Innanzi tutto va rilevato che quello della radiofonia era un mondo che, per ovvie e evidenti ragioni, non era circoscritto ai confini nazionali. Il radioamatore cercava di captare i segnali delle onde radio straniere e si dimostrava soprattutto attento alle novità in materia, anche internazionali. Come è stato notato dagli studiosi¹⁷, un buon numero di ascoltatori, soprattutto agli esordi, sembrava essere interessato non tanto all'ascolto di un programma, quanto piuttosto all'esperienza dell'ascolto in sé, della ricerca nell'etere delle emissioni che avevano carattere

¹⁴ Cfr *Lo Statuto di Bambinopoli*, RO, a. III, n. 36, 3 settembre 1927, pp. 7-8.

¹⁵ Su questa significativa esperienza della pubblicistica periodica italiana per ragazzi e sul suo ideatore, si vedano almeno: M. Barsali, *Bertelli Luigi (Vamba)*, in *Dizionario Biografico degli Italiani*, Roma, Istituto dell'Enciclopedia Italiana, vol. 10, 1967, pp. 494-499; 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. 317-339; A. Ascenzi, M. Di Felice, R. Tumino (edd.), «*Santa Giovinezza!*». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica, 2008; A. Ascenzi, *Bertelli Luigi*, in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione d'ora in poi DBE*, 2 vols., Milano, Editrice Bibliografica, 2013, vol. 1, pp. 147-148.

¹⁶ Cfr. S. Fava, *Piccoli lettori del Novecento. I bambini di Paola Carrara Lombroso sui giornali per ragazzi*, Torino, Sei, 2015.

¹⁷ Oltre alle opere già ricordate alla nota 2, si veda P. Ortoleva, *Fermare la voce: usi e funzioni di un organo di stampa alle origini della comunicazione via etere*, in L. Parola (ed.), *E poi venne la radio. Radio Orario 1925-1929*, Torino, Rai Eri, 1999, pp. 15-37.

transnazionale. Non a caso le riviste dell'URI, prima, e dell'EIAR, dopo, si preoccuparono di mettere in contatto il pubblico italiano con quello straniero, più progredito nell'accostamento alla radio. Fin dall'inizio, «Radioraio» ebbe una rubrica fissa (*Notizie radiofoniche* e poi *Il rotto della cuffia*) che offriva informazioni provenienti dagli altri omologhi organi di stampa delle radio straniere. È stata sottolineata in proposito «l'esterofilia» del «Radiorario» e del «Radiocorriere», fino alla vigilia del secondo conflitto mondiale. I programmi stranieri continuarono a essere pubblicati anche nella seconda metà degli anni Trenta, allorché in Italia era in vigore il divieto di ascolto in pubblico degli stessi. Tale caratteristica era legata «alla specificità, non solo e non tanto del mezzo, quanto del suo pubblico iniziale, avido di novità e attento ai modelli stranieri»¹⁸. Dunque sia pure non ancora evidenziato, allo stato attuale delle ricerche, il rinvio al modello inglese da parte della programmazione italiana per fanciulli è molto plausibile e non rappresenta un'eccezione, vista l'attenzione della radio nazionale per le iniziative radiofoniche di altri Paesi.

Inoltre, e questa seconda ragione è valida soprattutto per la fase iniziale della radiofonia in Italia, va considerato che nei primi anni del fascismo, in ragione del limitato interesse di quest'ultimo al mezzo radiofonico, ma anche della sua oggettiva scarsa diffusione nelle case degli italiani, la radio si presentava «come un fenomeno di élite ed [offriva] una cultura di stampo fortemente aristocratico-borghese di sapore ottocentesco, con rare ed estemporanee iniezioni di superficiale fascismo»¹⁹. I sondaggi, condotti in modo artigianale dagli organi di stampa fra le fine degli anni Venti e gli inizi degli anni Trenta, nonché la corrispondenza con le stesse riviste fotografano un pubblico borghese, conservatore nei gusti, frequentatore di teatri e di sale da concerto²⁰. A questo pubblico appartenevano i fanciulli che ascoltavano la radio: si trattava di ragazzi adusi alla lettura dei periodici loro destinati, con i quali interagivano tramite l'invio di lettere e la partecipazione a iniziative anche di solidarietà. Sabrina Fava ha ben documentato questa collaborazione dal punto di vista dei bambini, studiando la corrispondenza fra i giovani lettori e la redazione del «Corriere dei piccoli» di Milano e poi de «Il Bollettino delle bibliotechine rurali»²¹. Non è forse un caso, come si vedrà, che proprio dal circuito di queste riviste per l'infanzia provenissero alcune delle organizzatrici del *Cantuccio dei Bambini* di Milano, che orientarono il programma secondo una impostazione molto simile ai primi anni del *Children's Hour* inglese, dove prevalevano la musica, la narrazione delle fiabe, i giochi di enigmistica, gli indovinelli. Va precisato fin da ora che le analogie contenutistiche fra radio inglese e radio italiana sarebbero

¹⁸ *Ibid.*, p. 25.

¹⁹ Monticone, *Il fascismo al microfono. Radio e politica in Italia (1924-1945)*, cit., p. X.

²⁰ Isola, *Abbassa la tua radio per favore*, cit., pp. 83-101, in specie p. 90.

²¹ Fava, *Piccoli lettori del Novecento. I bambini di Paola Carrara Lombroso sui giornali per ragazzi*, cit.

presto passate in secondo piano in quanto il fascismo avrebbe sempre più segnato la programmazione per fanciulli in Italia.

Come accennato, il primo programma radiofonico dei ragazzi con una continuità settimanale, un gruppo di collaboratori fisso e una progettualità definita fin dagli inizi fu *Il Cantuccio dei Bambini* trasmesso dal gennaio del 1926 dalla stazione di Milano. Esso durava circa mezz'ora, nella fascia oraria compresa fra le 17.00 e le 18.00, e negli anni fu mandato in onda non sempre negli stessi giorni. Se alla fine del 1927, ad esempio, esso era previsto il giovedì, il sabato e la domenica, nel febbraio del 1928 era programmato tutti i giorni escluso il lunedì²². Dagli inizi *Il Cantuccio* diede ampio spazio alla musica, in specie quella classica, anche suonata da bambini, alla narrazione di fiabe e di brani di commedie, a momenti di aggiornamento sulla musica o su nozioni naturali. Tale attenzione alla dimensione musicale, che ben si iscriveva nelle specificità della stazione di Milano²³, era il frutto dell'impostazione data dai suoi promotori. Ideatrice del *Cantuccio* era Elisabetta Oddone (1878-1972), compositrice e cantante, molto apprezzata in Italia e all'estero anche per la sua opera a sostegno delle donne musiciste e della diffusione dell'educazione musicale fra i più piccoli²⁴. Nel 1921 ella aveva fondato nel capoluogo lombardo la FA.MI., Federazione Audizioni Musicali Infantili, che si proponeva di incoraggiare la formazione musicale fra i bambini, tra l'altro avviati al canto corale nella propria scuola, secondo il metodo sperimentato dal 1914 dal maestro Alessandro Perlasca presso la «Scuola Rinnovata» di Giuseppina Pizzigoni a Milano²⁵. Insegnante in questa scuola e estimatrice del suo metodo era anche una delle prime collaboratrici della Oddone nella promozione del *Cantuccio*, ovvero Pierina Boranga²⁶. L'azione contro l'analfabetismo musicale infantile svolta dalla FA.MI. ottenne l'elogio di Giuseppe Lombardo Radice, il quale ne riconobbe il sostegno dato alla sua opera di rinnovamento didattico

²² Si veda la programmazione indicata da RO, a. III, n. 49, 3 dicembre 1927, e a. IV, n. 7, 12 febbraio 1928.

²³ Cfr. S. Sablich, D. Spini, *Musica Musica*, in Parola (ed.), *E poi venne la radio. Radio Orario 1925-1929*, cit., pp. 125-135; più in generale si veda: A. I. De Benedictis (ed.), in collaborazione con F. Monteleone, *La musica alla radio, 1924-1954: storia, effetti, contesti in prospettiva europea*, Roma, Bulzoni, 2015.

²⁴ Su di lei si veda la voce edita in R. Farina (ed.), *Dizionario biografico delle donne lombarde (568-1968)*, Milano, Baldini e Castoldi, 1995, p. 807.

²⁵ Cfr. f.a.s., P. Vitali, *L'insegnamento oggettivo della musica nelle scuole elementari secondo il metodo Perlasca*, «Annali della Pubblica Istruzione. Scuole elementari», a. I, n. 3, ottobre 1924, pp. 69-78; *Gara Corale della FA-MI in Milano*, *ibid.*, pp. 121-122. Sul metodo Pizzigoni si veda O. Rossi Cassottana, *Giuseppina Pizzigoni e la Rinnovata di Milano. Tradizione e attualità per la scuola primaria*, Brescia, La scuola, 2004. Sulla formazione musicale a scuola si veda A. Scalfaro, *Storia dell'educazione musicale nella scuola italiana. Dall'Unità ai giorni nostri*, Milano, FrancoAngeli, 2014.

²⁶ Su di lei si veda la scheda curata da F. Targhetta in DBE, vol. 1, pp. 195-196.

delle elementari in Italia, nel quadro della riforma Gentile, che aveva posto l'enfasi sulle attività espressive della soggettività infantile²⁷.

Le finalità perseguite dalla FA.MI. furono riprese dal *Cantuccio*. Secondo la programmazione dell'ottobre del 1926, esso prevedeva giorni dedicati alle esecuzioni pianistiche, alle canzoni popolari, alle liriche infantili italiane e straniere. Vi erano giorni fissi per la rassegna stampa dei giornali infantili, per le informazioni librarie, per i profili di musicisti (periodicamente vi era un «Medaglionicino» su un grande compositore), per le conversazioni scientifiche (tenute da P. Boranga impegnata in questo ambito, proprio in quegli anni, con apposite pubblicazioni per ragazzi), per la lettura delle fiabe affidata a una delle collaboratrici, nota ai bambini come la «tesoriera delle fiabe», ma il cui nome non era rivelato²⁸. Nel corso dell'anno vi erano poi settimane destinate a argomenti specifici, eventi, festività. Così accanto a quelle per il Natale, la Pasqua e il Carnevale, nel 1926 era organizzata quella su *Pinocchio* in coincidenza con la data di nascita di Collodi (24 novembre)²⁹. In quella occasione oltre alla lettura dell'opera, fu mandato in onda un atto della *Commedia di Pinocchio* scritta da A. Cuman Pertile³⁰, musicata dalla Oddone, predisposta appositamente per questa ricorrenza e per essere rappresentata al teatro dell'Unione Femminile Nazionale di Milano³¹.

Questo ultimo riferimento disvela il forte intreccio fra letteratura per l'infanzia e musica, ancora tutto da analizzare, e che proprio nella radio delle origini trovò un canale di diffusione e di crescita anche verso nuovi percorsi meritevole di essere approfondito dagli studiosi.

La stazione di Milano dei primi anni ne è un significativo esempio. Elisabetta Oddone, sostenitrice della causa delle biblioteche delle scuole rurali promossa

²⁷ G. L-R., *Corsi speciali ed iniziative varie per l'attuazione dei nuovi programmi delle scuole elementari*, «Annali della Pubblica Istruzione. I: Scuola elementare», a. I, n. 1-2, giugno 1924, pp. 70-75.

²⁸ Zia Radio, *Il Cantuccio dei Bambini della Stazione di Milano*, RO, a. II, n. 36, 4 settembre 1926, p. 3; *Il Cantuccio dei Bambini*, *ibid.*, a. II, n. 39, 25 settembre 1926, p. 6.

²⁹ Zia Radio, *Le settimane del Cantuccio dei Bambini*, RO, a. II, n. 33, 14 agosto 1926, p. 6; Zia Radio, *Il Cantuccio dei Bambini della Stazione di Milano*, cit.; E. Oddone, *Il Cantuccio dei Bambini. Stazione di Milano*, *ibid.*, a. II, n. 46, 13 novembre 1926, p. 5; Zia Radio, *Stazione di Milano. «Cantuccio dei bambini». Secondo semestre di attività*, *ibid.*, a. II, n. 51, 18 dicembre 1926, pp. 5-6.

³⁰ Su A. Cuman Pertile si veda la voce redatta da F. Targhetta in DBE, vol. 1, pp. 418-419.

³¹ Le due autrici, Cuman Pertile e la Oddone, avevano altresì previsto di redigere l'opera con attenzione alle scuole affinché gli insegnanti potessero farla rappresentare dagli alunni; di qui il coinvolgimento di A. Mussino, che aveva già illustrato *Le avventure di Pinocchio* nell'edizione per Bemporad del 1911, destinata a diventare un classico fino ad oggi. Al celebre illustratore fu affidato il compito «d'infiorare le scene di vaghi e briosi disegni» che facilitassero «la preparazione dei costumini e degli scenari» e prestarsi alla «fabbricazione di piccole marionette per un divertente teatrino pinocchiesco»: *La Commedia di Pinocchio. Scene, visioni e melologhi tratti dalla fiaba meravigliosa di E. Collodi*, riduzione e cori di A. Cuman Pertile. Musica di E. Oddone. Figurini e scenari di A. Mussino, Firenze, Bemporad & Figlio, 1926 (la citazione a p. 6). Sul contributo dato da Mussino alla storia della letteratura giovanile come illustratore, si veda almeno la scheda biobibliografica curata da S. Assirelli in DBE, vol. 2, pp. 220-221.

da Paola Carrara Lombroso dal 1909 con il «Corriere dei piccoli» e poi con «Il Bollettino delle bibliotechine rurali», proprio grazie alla Lombroso era entrata in contatto con Lucia Maggia (in arte Hedda) e aveva composto la musica della fiaba in versi da lei scritta *Petruccio e il cavolo Cappuccio* del 1916³². La fiaba fu mandata in onda dal *Cantuccio* alla fine del 1928³³, mentre a gennaio di quell'anno la stazione ambrosiana aveva ospitato l'audizione di un'altra collaborazione fra L. Maggia e E. Oddone, ovvero *La lezione di Meo*³⁴.

Non vi è lo spazio per soffermarsi ulteriormente su questi intrecci, qui preme piuttosto richiamare l'attenzione sul fine che il programma radiofonico milanese per bambini si poneva. In linea con gli obiettivi che la radio non solo italiana, ma più in generale di altri Paesi europei, perseguiva, esso voleva divertire, informare, educare. Nello specifico intendeva educare al bello, ma non in modo pedante. Spiegava la Oddone ai bambini

il nostro Cantuccio non deve essere soltanto l'amico piacevole che vi diverte, vi fa ridere, vi tiene al corrente di qualche novità; ma il maestro garbato che insegna senza il piedistallo opprimente di una cattedra, senza l'esteriorità ampollosa del pedagogo; il compagno geniale che vi guida alla ricerca del buono, senza il peso di una predica arida e intransigente; il consigliere che vi addita il bene senza minacce di castighi ma solo attraverso un brillante succedersi di dimostrazioni efficaci; la scuola libera, adorna di stampe, di fiori, piena di luce e di sole, che tutto anima, che tutto ravviva, che sa divenire indispensabile al bambino e che divide colla casa la più buona parte del suo amore alle cose. In ogni nostra parola, in ogni nostro atteggiamento ci deve essere qualcosa di utile, di salutare per voi, ma voi non dovete accorgervene, altrimenti, bizzarri come siete, sbadigliate³⁵.

Si individuano molto bene nelle parole usate da Elisabetta Oddone i rinvii a alcuni concetti chiave della pedagogia nuova che circolava in Italia e che, tra l'altro, trovava espressione nella già ricordata esperienza della Pizzigoni con cui *Il Cantuccio* milanese aveva uno speciale legame, o nella Scuola serena di Lombardo Radice (il quale a sua volta, come si è visto, apprezzava il lavoro svolto dalla Oddone), o ancora nel metodo di Maria Montessori di cui si parlava ai giovani ascoltatori sia tramite specifiche trasmissioni, sia ospitando il coro degli alunni della scuola dell'Umanitaria (diretto dalla stessa Oddone) che quel metodo applicava³⁶, o infine nel Gruppo d'azione per le scuole del

³² Sui contatti fra Paola Carrara Lombroso, la Oddone e la Maggia si rinvia a Fava, *Piccoli lettori*, cit., pp. 271-276.

³³ Cfr. *Il cantuccio dei bambini*, RO, a. IV, n. 47, 18 novembre 1928, p. 14.

³⁴ Si tratta di Hedda, *La Lezione di Meo*, musiche di E. Oddone, Milano, Ricordi, 1928. Cfr. *Il Cantuccio dei Bambini*, RO, a. IV, n. 5, 29 gennaio 1928, p. 16; *Il Cantuccio dei Bambini*, *ibid.*, a. IV, n. 7, 12 febbraio 1928, p. 7.

³⁵ E. Oddone, *Il Cantuccio dei Bambini*, RO, a. III, n. 34, 20 agosto 1927, p. 7.

³⁶ Si vedano, tra gli altri, i seguenti contributi, che documentano i contatti fra la trasmissione radiofonica milanese per ragazzi e la Montessori: *Il Cantuccio dei bambini della stazione di Milano*, RO, a. II, n. 31, 31 luglio 1926, pp. 5-6; E. Oddone, *Il Cantuccio dei Bambini (Stazione di Milano)*, *ibid.*, a. III, n. 24, 11 giugno 1927, p. 5; *Il Cantuccio dei Bambini*, a. III, n. 26, 25 giugno 1927, p. 10. Sull'educazione musicale nelle scuole montessoriane, si rinvia a Scalfaro, *Storia dell'educazione*

popolo le cui insegnanti erano accolte in una speciale puntata mandata in onda nell'ottobre del 1927³⁷. Attiva collaboratrice del Gruppo d'azione e anch'essa impegnata nell'ambito dell'editoria per ragazzi era altresì Maria Bersani che fu vicina alla Oddone nell'avvio del *Cantuccio*³⁸.

Al fine di ottenere il risultato sperato, ovvero divertire educando senza pedanterie, con studiata leggerezza, sfuggendo alle volgarità³⁹, negli anni lo staff milanese si premurò di imprimere al programma un'aura magica, che doveva connotare sia il mezzo sia i contenuti. L'apparecchio radio era paragonato a una «grotta incantata» o a «un palazzo fatato» che, portando la voce e il suono a molti chilometri di distanza, esercitava «una specie di malia sui giovani»⁴⁰. Magico era anche il mondo presentato agli ascoltatori. Era un mondo popolato di fate; quelle stesse fate che, come affermava la Oddone nel discorso tenuto nel 1927 per la celebrazione del secondo anniversario de *Il Cantuccio*, avevano portato i fiori per l'occasione e «erano venute in massa dalle loro lontane dimore, per conoscerci e per dirci un grazie»⁴¹. Così la trasmissione mandava in onda la lettura non solo di libri edificanti, ma anche di svago come quelli di Yambo (alias Enrico Novelli), che la Oddone giudicava «divertente, interessante oltre ogni dire»⁴².

Sulla base delle numerose notizie reperite su «Radiorario», si fatica a trovare nella programmazione dei primi anni del *Cantuccio* contenuti che evocassero la quotidianità politica del fascismo. La sintesi pubblicata dall'«Annuario» dell'EIAR del 1929, che faceva il punto di tre anni di attività, confermava la peculiare attenzione della trasmissione milanese per la musica: in quel lasso di tempo si erano esibiti 38 pianisti, 18 cantanti, 13 cori, 7 compositori e erano stati presentati 28 profili di grandi artisti, tra cui Mozart, Bach, Verdi, Donizetti, Rossini, Brahms, Schumann, Beethoven⁴³. Nel luglio del 1928 scrivendo del programma e delle sue finalità, le promotrici ne sottolineavano ancora una volta lo stile sobrio e paragonavano la sua azione educativa a quella delle

musicale nella scuola italiana, cit., pp. 175-186; T. Pironi, *Musica e educazione alla cittadinanza nelle esperienze didattiche di Rosa Agazzi, Giuseppina Pizzigoni, Maria Montessori*, «Muscia Docta», vol. 7, 2017, pp. 1-9.

³⁷ E. Oddone, *Il Cantuccio dei Bambini*, RO, a. III, n. 40, p. 6. Sull'esperienza, sempre di origini milanesi, del Gruppo d'azione, si vedano: R. Lollo, *Cultura magistrale a Milano. Il «Gruppo d'azione» e la Biblioteca Nazionale dei maestri italiani*, Milano, Prometheus, 1996; M.M. Rossi, *Il Gruppo d'azione per le scuole del popolo (1919-1941)*, Brescia, La Scuola, 2004.

³⁸ Anche per questa figura di educatrice e di insegnante, si rinvia alla scheda curata da S. Fava in DBE, vol. 1, pp. 144-145.

³⁹ Cfr. E. Oddone, *Il Cantuccio dei Bambini*, RO, a. III, n. 38, 17 settembre 1927, p. 4, dove si dava notizia che erano in atto le audizioni per la selezione di bambini che si esibissero nella lettura, nella recitazione e in esecuzioni musicali e che vi era grande attenzione a scegliere i migliori per infondere «un carattere di diletto educativo al [...] ritrovo giornaliero».

⁴⁰ Zia Radio, *Il Cantuccio dei bambini*, RO, n. 8, 20 febbraio 1926, p. 2.

⁴¹ *Il Cantuccio dei Bambini*, RO, a. III, n. 51, 17 dicembre 1927, pp. 3-4.

⁴² *Il Cantuccio dei bambini*, RO, a. III, n. 32, 6 agosto 1927, p. 4.

⁴³ Cfr. *I programmi radiofonici*, «Annuario dell'E.I.A.R.», 1929, p. 75.

madri, che come «voci sommesse» scendevano «al cuore per le vie dell'anima e non attraverso gli spazi» e come «fiori modesti» diffondevano «il profumo senza esibizioni di colori». L'animo dei bambini, era precisato, rappresentava «lo spirito degli Italiani di una generazione che [stava] sviluppandosi per consolidare le forze della nostra Terra» ed era «qualcosa di sacro» da curare con attenzione. E il *Cantuccio* lo faceva attraverso una gara di «anime materne», che comprendeva «tutte le delicatezze delle nobili passioni», «le armonie dei suoni e della parola» volte a elevare i ragazzi a «ideali di purezza, di rettitudine, di giustizia, di onestà»⁴⁴. Insomma lo staff del *Cantuccio* non era avulso dall'attualità politica del Paese, ma questa si concretizzava soprattutto nella grandezza della nazione. Ben presente, infatti, nella programmazione di quegli anni era l'esaltazione della dimensione nazionale, richiamata in specie in occasione dei diversi anniversari della Grande Guerra e del Risorgimento⁴⁵.

Con ciò non si vuol dire che i suoi promotori non fossero fascisti. Secondo i suoi biografi, Elisabetta Oddone si schierò apertamente in tal senso e così pure tra gli uomini di punta della stazione si trovano figure di spicco dell'intellettualità fascista, quali il classicista Ettore Romagnoli, docente ai tempi all'Università di Pavia⁴⁶. Il *Cantuccio* era piuttosto l'espressione della tranquilla quotidianità «di un interno borghese», appagato del momento⁴⁷, in cui il mondo infantile preservava i suoi spazi ludici e di fantasia in continuità con la tradizione, ma senza per questo opporsi al nuovo ordine politico.

Decisamente più allineato, fin dagli inizi, con il clima politico del tempo era invece il programma per i più piccoli della stazione di Roma. Si trattava del *Giornale radiofonico del fanciullo*, trasmesso dall'11 ottobre 1926 per circa mezz'ora tutti i giorni della settimana, esclusa la domenica, nella fascia oraria compresa fra le 16 e le 17⁴⁸. Ideatore e anima del programma fu Cesare Ferri, noto come «Nonno Radio», attivo insegnante di origini romagnole e pubblicitista che coglieva a pieno le potenzialità del nuovo mezzo di comunicazione

⁴⁴ Radiolina, *Il Cantuccio dei bambini*, RO, a. IV, n. 30, 22 luglio 1928, pp. 13-14 (la citazione è a p. 13).

⁴⁵ Si vedano, tra gli altri, i seguenti contributi: M. Bersani, *Il Cantuccio dei Bambini della Stazione di Milano*, RO, a. II, n. 13, 27 marzo 1926, pp. 6-7, dove si precisa che erano state ricordate le Cinque giornate di Milano con l'esecuzione di canti patriottici; *Artisti e ascoltatori del «Cantuccio»*, *ibid.*, a. II, n. 26, 26 giugno 1926, p. 6, da cui emerge che nelle settimane precedenti *Il Cantuccio* aveva commemorato il 24 maggio, la data della morte di Garibaldi, con interventi di «Zia Elena» e Elisabetta Oddone, le imprese degli Alpini, con una rievocazione di Pierina Boranga.

⁴⁶ Cfr. Monteleone, *La radio italiana nel periodo fascista. Studio e documenti 1922-1945*, cit., pp. 40-41; su Romagnoli si veda la voce curata da G. Piras in *Dizionario Biografico degli Italiani*, cit., vol. 88, 2017, pp. 189-194. Si tenga però presente che tra i collaboratori del *Cantuccio* troviamo anche figure non allineate con il fascismo, quali A. Cuman Pertile, M. Bersani, P. Boranga come evidenziato dalle biografie richiamate nelle note precedenti.

⁴⁷ Papa, *Storia politica della radio in Italia*, vol. 1: *Dalle origini agli anni della crisi economica 1924-1934*, cit., p. 40.

⁴⁸ Cfr. *Stazione radiofonica di Roma. «Giornale Radiofonico del fanciullo»*, RO, a. II, n. 41, 9 ottobre 1926, p. 6.

nell'avvicinare i ragazzi⁴⁹. Vari erano gli interessi e gli argomenti affrontati. La trasmissione iniziava con «un... articolo di fondo sull'avvenimento del giorno», al quale facevano «seguito note e commenti ad uso dei Balilla e delle Piccole Italiane su le cronache del Regno e dell'estero», brani tratti da una novella, una favola o un racconto, una poesia, «il calendario storico e quello religioso», i concorsi di enigmistica, la corrispondenza fra «Nonno Radio» e i piccoli ascoltatori⁵⁰. Questi ultimi, come già ricordato, furono organizzati da Ferri in un gruppo di ascolto, denominato la «Nipoteria»⁵¹. *Giovinazza* e la *Marcia reale* rappresentavano la colonna sonora del programma, che iniziava con il saluto fascista «alalà» pronunciato da «Zia Radio», ovvero l'annunciatrice Maria Luisa Boncompagni⁵².

La programmazione poteva variare nel corso dell'anno. Vi furono, infatti, puntate speciali in occasione delle feste civili e politiche o di particolari ricorrenze e furono celebrati l'intervento in guerra e la Vittoria, il Natale di Roma, la Fondazione dei Fasci, la Marcia su Roma, la nascita del Duce, la fondazione del «Popolo d'Italia». Immediato fu il sostegno di Mussolini, che inviò un messaggio di saluto a Ferri, poi riprodotto sulla tessera destinata alla «Nipoteria» e soprattutto indicato come fine del sodalizio stesso. Tale fine era riassunto nel motto «Perseverare e migliorare» e affidava ai giovani il compito di essere «i custodi fedeli per tutta la vita della nuova eroica civiltà, che l'Italia [stava] creando nel lavoro, nella disciplina, nella concordia». In virtù di questo comandamento ogni socio era chiamato a impegnarsi nel perseguire i due seguenti obiettivi: «Una gara permanente di bontà e di bene; educazione al culto di Dio, della Patria, della famiglia»⁵³.

⁴⁹ Per le notizie biografiche su Cesare Ferri, interessante figura di educatore e pubblicitista del ventennio fascista il cui ruolo non è ancora stato adeguatamente indagato, cfr. M.A. Alla, *Nella famiglia magistrale. Nonno radio di anni dieci*, «I Diritti della scuola», a. XXXVIII, n. 6, 13 novembre 1936, pp. 85-86; «Annuario della stampa italiana», vol. 20, 1940, p. 459; R. Nunziata, *Nonno Radio. Cesare Ferri educatore e pioniere dall'URI all'Eiar*, Maser (TV), Mosè edizioni, 2017. Egli fu, tra l'altro, fondatore nel 1931 della rivista «Giovanissima. Rivista mensile per i ragazzi e le famiglie» edita, sia pure con titolo in parte modificato, fino al 1943. Ferri resse la direzione del periodico per tutta la sua durata insieme a Giordano Gattamorta, fino al 1938, e poi a Luigi Pinti. Su questo foglio educativo-scolastico si veda: A. Piazzoli, *La rivista «Giovanissima» e l'educazione delle giovani generazioni negli anni Trenta (1936-1939)*, Tesi di laurea, Facoltà di Scienze della Formazione (relatrice prof. C. Ghizzoni), Università Cattolica del Sacro Cuore di Milano, a.a. 2009-2010.

⁵⁰ Uno qualunque, *Il giornalino radiofonico del fanciullo*, RO, a. III, n. 2, 8 gennaio 1927, p. 3.

⁵¹ Cfr. *Statuto della Nipoteria*, cit.

⁵² Cfr. Uno qualunque, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri. Celebrazione del primo anniversario*, RO, a. III, n. 46, 12 novembre 1927, pp. 5-6; Uno qualunque, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri. La grande adunata dei piccoli radioamatori romani. Folla di parenti e di «nipoti». La trasmissione dei burattini. Recitazione e musica. La premiazione. Dulcis in fundo*, *ibid.*, a. III, n. 18, 30 aprile 1927, pp. 6-7.

⁵³ *Statuto della Nipoteria*, cit.

L'impostazione data alla trasmissione era molto attiva e coinvolgente nei modi e nei temi, non esclusivamente circoscritti all'ambito politico, in grado di fare presa sui ragazzi per la loro modernità. Nel 1927, ad esempio, fu promossa una gara fra gli ascoltatori relativa alla trasvolata compiuta dal Colonnello Francesco De Pinedo da Roma al Brasile fino all'America del Nord. «Nonno Radio» sollecitava i giovani ascoltatori a non limitarsi a esaltare l'impresa, ma a cercare di conoscerla, descrivendo tappa per tappa il volo, annotando i nomi dei luoghi visitati e formulando propri pensieri. L'impegno era ovviamente proporzionato all'età: i più grandi, ad esempio, potevano allegare cartine illustrate, fornire notizie geografiche e storiche sui paesi raggiunti. «Si vuole insomma – precisavano gli organizzatori – la più esatta impressione che l'ala italiana ha lasciato nell'animo e nella mente dei nostri amici giovinetti un solco profondo». I premi erano molti e consistevano in cartelle del prestito littorio, copie del volume di De Pinedo sulla trasvolata, areoplanini per i più piccoli⁵⁴. Il concorso ottenne il plauso del quadrumviro Italo Balbo, sottosegretario di Stato per l'aeronautica, che invitò un gruppo di venti ascoltatori fra i 5 e i 15 anni a compiere un breve volo, sull'esempio dei figli del duce, a bordo di «un maestoso Caproni» sulla città di Roma⁵⁵. Ovviamente l'evento ebbe grande risonanza sulla stampa dell'epoca e numerosi furono i ragazzi che chiesero di partecipare con le loro famiglie.

Il tipo di premio, riproposto per un altro concorso nel 1927⁵⁶, era in linea con il contributo che l'URI stava dando alla propaganda aeronautica⁵⁷, ma era anche indicativo dello spirito innovatore del programma per ragazzi della stazione romana rispetto a quella milanese. E, infatti, ad esempio, mentre la stazione di Roma, nel giugno del 1927, celebrava le imprese nazionali nell'aeronautica consentendo ai bambini di provare l'emozione del volo, quella di Milano, nello stesso mese, con il *Cantuccio* mandava in onda un «medaglione» di Mendelssohn⁵⁸.

Anche la trasmissione di Cesare Ferri si rivolgeva a un'infanzia borghese⁵⁹, che poteva permettersi gli agi della vacanza al mare o ai monti, come emerge

⁵⁴ Cfr. Uno qualunque, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma*. Direttore Cesare Ferri, RO, a. III, n. 11, 12 marzo 1927, pp. 6-7.

⁵⁵ *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma*. Direttore Cesare Ferri, RO, a. III, n. 15, 9 aprile 1927, pp. 7-8; *La propaganda aviatoria dell'URI. Un prossimo volo dei Nipoti di «Nonno Radio»*, *ibid.*, a. III, n. 24, 11 giugno 1927, pp. 3-4; si veda anche *Gli aquilotti di 1 Ro volano per il cielo dell'Urbe*, *ibid.*, a. III, n. 25, 18 giugno 1927, pp. 1-2.

⁵⁶ Cfr. *Regolamento per un concorso tra fanciulli per la costruzione di «modellini» in carta del velivolo «Santa Maria»*, RO, a. III, n. 26, 25 giugno 1927, p. 6.

⁵⁷ Sul contributo dato dall'URI alla propaganda aeronautica, si veda Monticone, *Il fascismo al microfono: radio e politica in Italia (1924-1945)*, cit., p. 373.

⁵⁸ E. Oddone, *Il Cantuccio dei Bambini (Stazione di Milano)*, RO, a. III, n. 24, 11 giugno 1927, p. 5.

⁵⁹ Si veda, tra gli altri, Nonno Radio, *Giornale Radiofonico del fanciullo della stazione di Roma*. Direttore Cesare Ferri, RO, a. IV, n. 35, 26 agosto 1928, pp. 14-15; da cui emerge lo scarto fra l'infanzia bisognosa e gracile, incontrata durante la visita da parte di Ferri alle colonie

dalla corrispondenza estiva dei bambini, e che poteva ascoltare comodamente la radio nelle proprie case e essere accompagnata dai propri genitori al campo di volo di Centocelle per salire sull'aereo e sorvolare Roma, più intimorita dall'evento, che non dalla mondanità che connotava l'evento stesso. Il *Giornale radiofonico del fanciullo* ricorreva alla tradizionale modalità dei premi per accrescere il numero dei propri ascoltatori e per accreditarsi presso le famiglie, ma sapeva usare modalità attive, coinvolgenti (quali le gite in città⁶⁰) e soprattutto sensibili agli elementi della modernità che potevano fare presa sulla fantasia dei bambini (il volo in aereo). L'intrattenimento e le finalità ricreative erano evidenti e, anche in questo caso, erano sempre legate a quelle educative, ma tra queste prevaleva indubbiamente e palesemente il coinvolgimento degli ascoltatori nella progettualità politica del fascismo. Di qui, ad esempio, alla fine del 1927, l'insistito richiamo ai bambini che volevano partecipare ai «Giovedì» di «Zia Radio» di M.L. Boncompagni, in cui potevano dare prova delle proprie abilità artistiche, all'esecuzione di musiche, canti, brani di prosa o poesie che fossero «italianissimi»⁶¹; o, ancora, nel 1928 il bando di un concorso volto a «formare una coscienza coloniale nei giovanissimi» e che prevedeva lo svolgimento di un tema dal titolo «Un viaggio ideale attraverso le nostre colonie»⁶².

La modernità del programma romano si coniugava altresì alla capacità di assecondare gli stili e i moduli narrativi propri della radio come è documentato da altre iniziative. Si segnala, ad esempio, l'idea, della primavera del 1927, di organizzare un concorso fra i giovani ascoltatori in occasione del «Giro d'Italia»⁶³, momento centrale, insieme alle partite di calcio, della vita sportiva nazionale che, di lì a qualche anno, anche grazie alla radio, diveniva un evento di massa. Anzi il *Giornale Radiofonico del fanciullo* risultava all'avanguardia nella programmazione nazionale, in quanto solo in quei mesi e a fatica, per evidenti ragioni tecniche, lo sport cominciava a entrare nella programmazione radiofonica⁶⁴. Il concorso indetto da Ferri prevedeva due modalità di partecipazione che sapevano legare divertimento e finalità educative: i bambini potevano indicare i nomi dei ciclisti che, secondo loro, sarebbero figurati fra

temporanee e permanenti romane, e quella più agiata, che scriveva a «Nonno Radio» dai luoghi di villeggiatura in cui si trovava con le famiglie.

⁶⁰ Prima dell'estate del 1927, a fine anno scolastico, ad esempio, il *Giornale radiofonico del fanciullo* coinvolse i suoi ascoltatori in una scampagnata a Monte Mario, organizzata con il contributo delle autorità scolastiche locali, che ebbe un grande successo: cfr. Uno qualunque, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri*, RO, a. III, n. 25, 18 giugno 1927, p. 9.

⁶¹ *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri. Giovedì di Zia Radio*, RO, a. III, n. 49, 3 dicembre 1927, p. 5.

⁶² Nonno Radio, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri*, RO, a. IV, n. 19, 6 maggio 1928, p. 11.

⁶³ Cfr. Uno qualunque, *Supplemento stampato al Giornale Radiofonico del fanciullo della Stazione di Roma. Direttore Cesare Ferri*, RO, a. III, [n. 22], 22 maggio 1927, p. 8.

⁶⁴ Sullo sport nella radio degli esordi, cfr. G. Isola, *Il «Radio Orario» sportivo*, in Parola (ed.), *E poi venne la radio. Radio Orario 1925-1929*, cit., pp. 149-166.

i primi cinque vincitori o redigere un disegno della cartina d'Italia con i nomi delle località più importanti attraversate dai corridori.

Terzo programma per ragazzi, in ordine di tempo, trasmesso dalla radio italiana fu quello della stazione di Napoli. Nel mese di dicembre del 1926 aveva inizio *Bambinopoli*, che si configurava come una conversazione radiofonica in onda il giovedì e la domenica alla cinque del pomeriggio, per mezz'ora circa⁶⁵. La voce narrante era quella di «Nonnina Radio», ovvero dell'annunciatrice Annita Garzia, di fatto ideatrice e organizzatrice della trasmissione. La finalità perseguita era quella di intrattenere i giovanissimi, leggendo novelle, incoraggiandoli nello studio, dando consigli su come comportarsi a scuola e in famiglia e inculcando ulteriormente il rispetto per i maestri e i genitori. Tale attenzione all'istruzione e all'educazione, tramite modalità attive e divertenti, fu il tratto costante del programma campano.

Affermavano, nel maggio del 1927, i conduttori della trasmissione: «la stazione di Napoli ha avuto di mira [...] non solo di procurare qualche ora di distrazione e di svago ai suoi fedeli piccoli ascoltatori, ma anche di indirizzarli verso una forma di studio e di applicazione che fosse del tutto aderente ai programmi oggi vigenti nelle scuole»⁶⁶. Come nel caso del *Cantuccio* milanese, la radio era presentata da A. Garzia come qualcosa di magico che poteva sollecitare «mirabili visioni di fate, di personaggi straordinari» che vivevano in un mondo soprannaturale, ma che compivano gesta animate da sentimenti naturali, ovvero ispirate ad amore, a bontà, a spirito di sacrificio. Il funzionamento di questa scatola magica, ella spiegava ai bambini, si basava però su una organizzazione razionale, moderna, curata nei minimi particolari che richiedeva molte premure per trovare occasioni di divertimento che sapessero altresì sollecitare gli ascoltatori a essere bravi studenti⁶⁷. «*Bambinopoli* – affermava la Garzia – è giovinezza, allegria, spensieratezza, ma vuol dire soprattutto sprone a tutto ciò che vi è di più bello, nobile e grande, per lo sviluppo dell'intelligenza e la elevatezza dei sentimenti del cuore, per l'educazione della balda gioventù del domani, onore e vanto della nostra più grande Italia»⁶⁸.

La trasmissione si rivolgeva a un'infanzia che si muoveva, dunque, fra la famiglia e la scuola con i doveri che erano connessi a questi ambiti, ma anche con gli svaghi propri dell'età. Si trattava di un'infanzia che non sembrava essere ancora molto coinvolta nella quotidianità politica, pure però ben presente come sfondo al programma. Anche in questo caso, come in quelli milanese e romano, l'ambiente incontrato era quello borghese, che possedeva non solo la

⁶⁵ Cfr. *Il primo concorso di Bambinopoli*, RO, a. III, n. 9, 26 febbraio 1927, pp. 3-5.

⁶⁶ Microfolina, *Il secondo concorso di «Bambinopoli» ad 1 NA*, RO, a. III, n. 19, 7 maggio 1927, p. 6.

⁶⁷ La Nonnina, *Bambinopoli della Stazione di Napoli. La Nonnina al mondo dei piccoli*, RO, a. IV, n. 32, 5 agosto 1928, pp. 8-9 (la citazione a p. 8).

⁶⁸ La Nonnina, *Bambinopoli della Stazione di Napoli*, RO, a. IV, n. 40, 30 settembre 1928, p. 14.

radio, ma anche il telefono per mettersi in contatto con la redazione per avere informazioni.

Emblematici i temi dei concorsi promossi all'avvio. Il primo aveva come titolo «Impressioni leggendo Pinocchio», ovvero, come precisavano gli ideatori, il libro «più divulgato fra i bambini, e che [lasciava] in essi le maggiori impressioni intorno a questo piccolo eroe di legno»⁶⁹. Come testimoniato dalle richieste di chiarimento giunte alla radio tramite, appunto, le telefonate, esso ebbe un immediato successo, nonostante fosse stato bandito all'avvio del programma. La commissione incaricata di esaminare i compiti, formata da docenti della città e da giornalisti, aveva stilato una graduatoria di merito sulla base dei seguenti criteri: età, classe frequentata, progresso negli studi, calligrafia, «maggiore svegliatezza di ingegno nell'indicare le più svariate congetture formatesi nel leggere un libro come *Pinocchio*». Come premi, erano previsti giochi, ovvero bambole Lenci, pagliaccetti, meccano, hangar con due areoplani, automobili e scatole di caramelle destinate a chi non era compreso nell'elenco dei vincitori⁷⁰. Da notare, in merito, che i giocattoli insieme ai libri erano in genere i premi distribuiti nei diversi concorsi da tutti e tre i programmi radiofonici per ragazzi sin qui ricordati. Solo Roma, come si è visto, in occasione di concorsi a tema (la trasvolata di De Pinedo, la giornata coloniale) aveva messo in palio premi particolari, quali viaggi in aereo, cartelle del prestito littorio, medaglie dedicate allo specifico tema bandito.

Il secondo concorso organizzato da *Bambinopoli* aveva come oggetto la redazione di un disegno, in quanto, veniva fatto notare, la scuola fascista (ovvero la riforma Gentile) aveva riconosciuto l'importanza di questa attività come «rappresentazione ed espressione delle cose viste dai bambini e dei loro pensieri»⁷¹. Il terzo concorso prevedeva la recitazione di un brano in prosa o di una breve poesia. Il fine perseguito, affermavano gli organizzatori, non era quello di selezionare un giovane talentuoso che potesse parlare alla radio come «*speaker*», quanto piuttosto quello di formare i ragazzi a una corretta dizione e a un parlare sciolto, abilità molto utili nella vita⁷². Insomma il programma campano non voleva instillare nei bambini forme di protagonismo, ma istruire e educare.

Anche la stazione di Napoli sollecitò i più piccoli all'ascolto a partecipare alle attività della radio in modo attivo. Per questo motivo, nell'agosto del 1927 essa, come si è visto, istituiva la «Grande Confederazione di Bambinopoli»,

⁶⁹ *Il primo concorso di Bambinopoli*, cit., p. 3.

⁷⁰ *Ibid.*, p. 4. Sui giochi destinati all'infanzia in questo periodo si veda I. Mattioni, *Bambole e bambine nel Novecento: fra tradizione e modernità*, in M. Gecchele, S. Polenghi, P. Dal Toso (edd.), *Il Novecento: il secolo del bambino?*, Parma, Edizioni Junior, 2017, pp. 267-275.

⁷¹ Microfolina, *Il secondo concorso di «Bambinopoli» ad 1 NA*, cit., p. 6.

⁷² Cfr. *Il terzo concorso di «Bambinopoli» ad 1NA*, RO, a. III, [n. 22], 22 maggio 1927, p. 7; *Bambinopoli. Il terzo concorso di recitazione degli amici di Nonnina Radio ad 1NA*, *ibid.*, a. III, n. 25, 18 giugno 1927, pp. 10-11.

che intendeva «tenere uniti e far conoscere fra di loro i piccoli fedeli amici della Radio, [...] organizzare gite, bandire concorsi, abituare i Confederati alla disciplina, spronarli allo studio, all'amore verso i propri simili»⁷³.

Insomma nel giro di un anno circa la radio italiana aveva dato vita a più trasmissioni per i bambini che, ciascuna con la propria specificità e con accenti diversi, coniugavano la tradizione (evidente nelle letture proposte, negli autori di letteratura infantile coinvolti, nei valori trasmessi) con l'incipiente modernità (il mito del volo, lo sport di massa) e con il contesto politico. Esse facevano tesoro del meglio della letteratura giovanile, della produzione musicale per l'infanzia, nonché delle suggestioni della pedagogia nuova che, nel nostro Paese, provenivano sì dall'attivismo, ma soprattutto si alimentavano della cultura spiritualista del neoidealismo. È indubbio che fra i tre programmi ricordati, il più allineato con il fascismo era quello romano ideato da C. Ferri.

2. *La programmazione per ragazzi tra fine anni Venti e inizi anni Trenta*

Il panorama sin qui illustrato rappresentava solo l'inizio del fiorire di programmi per l'infanzia della radio italiana nel suo primo decennio di vita. Dall'estate del 1928, a quelle di Milano, Roma e Napoli, si aggiunsero via via nuove stazioni che pure misero in cantiere trasmissioni per i ragazzi, mentre quelle già attive, e nello specifico Milano, rinnovavano la propria programmazione. Nel contempo l'EIAR, in accordo con il governo, sperimentava forme di collaborazione fra radio e scuola a fini didattici.

Nel 1928 erano inaugurate le stazioni di Bolzano e di Genova e l'anno successivo quella di Torino. Nel 1931 entravano in funzione le stazioni di Palermo e Trieste, mentre nel 1932 erano avviate quelle di Firenze e Bari⁷⁴. Ognuna di queste realizzò propri programmi per i più giovani con protagonisti diversi, anche se, grazie ai collegamenti telefonici via cavo, esse in parte trasmisero anche programmi unificati. Tale evoluzione tecnica riguardò, per il periodo qui considerato (fino al 1933), soprattutto le stazioni del gruppo Nord, ovvero Torino, Genova, Milano, Trieste e Firenze e poi, sia pure però in modo

⁷³ *Lo Statuto di Bambinopoli*, cit., p. 7.

⁷⁴ Si tenga presente che nel 1927 venne messa a punto la riforma del servizio radiofonico, esito dei lavori della commissione reale presieduta dal segretario del Partito Nazionale Fascista, Augusto Turati. L'URI era sostituita dall'EIAR che aveva in concessione la gestione del servizio radiofonico. La riforma, tra l'altro, intervenne in materia finanziaria, al fine di consolidare il servizio, e stabilì il riordino degli impianti, con la costruzione di nuove stazioni – come visto – e il potenziamento di quelle già attive. Per questi aspetti si rinvia a Papa, *Storia politica della radio in Italia*, vol. 1: *Dalle origini agli anni della crisi economica 1924-1934*, cit., pp. 49-73; Monteleone, *La radio italiana nel periodo fascista. Studio e documenti 1922-1945*, cit., pp. 63-80.

molto meno importante, quelle di Roma, Napoli e Palermo⁷⁵. Le stazioni del gruppo Nord, a cominciare da Milano e Torino nel 1930, di fatto mandarono in onda *Il Cantuccio dei bambini* con la stessa programmazione per alcuni giorni della settimana. Si tenga altresì presente che, più in generale, in questi anni, con tale denominazione, venne definito lo spazio destinato dalla radio ai ragazzi, anche se ogni stazione aveva dato vita a una propria specifica proposta, in quanto si riconosceva nel *Cantuccio* milanese il primo segnale dell'attenzione della radiofonia italiana per il pubblico dei più piccoli⁷⁶.

Va detto che, dal canto suo, il *Cantuccio* milanese di questo periodo subiva significative modifiche rispetto alla fase d'avvio descritta in precedenza. Esso si configurava come un programma con interessi vari e non più come un «contenitore» di musica di alta qualità. La figura che emerge in questi anni (dal settembre del 1929) non è più quella di Elisabetta Oddone, ma quella di Ettore Margadonna, pubblicista e più tardi anche sceneggiatore per il cinema, che vestiva i panni di «Mago Blu» per i ragazzi in ascolto dell'emittente lombarda⁷⁷. Egli stesso spiegava, con ironia, che aveva scelto quel nome d'arte nell'intento di ristabilire la fama di questo colore non molto amato in quanto identificato con il personaggio di Barbablù. All'interno del *Cantuccio*, «Mago Blu» conduceva la «Rubrica dei perché» che riscuoteva grande successo presso i più giovani, e non solo, in quanto con il suo aiuto essi riuscivano a avere le risposte ai quesiti più difficili. A lui era anche affidato il programma della «fiaba spezzata», ovvero di una fiaba narrata fino a un certo punto della trama, lasciando agli ascoltatori il compito di completarla⁷⁸.

Il *Cantuccio* milanese prevedeva giorno per giorno contenuti diversi e questa programmazione nel corso del tempo subì ovviamente variazioni. Al fine però di rendersi conto di come era organizzato il programma, si tenga presente che, ad esempio, nel 1932 la «Rubrica dei perché» era in onda due volte la settimana (il lunedì o il martedì e il giovedì). Negli altri giorni, in questa fase, ai ragazzi erano proposti l'ascolto di musica e la lettura di fiabe, leggende, racconti. Non sempre

⁷⁵ Tali notizie sono dedotte dalla programmazione pubblicata dal «Radiocorriere». In specie si è fatto riferimento a: *Programmi da domenica 10 a sabato 16 gennaio 1932*, in «Radiocorriere» [d'ora in poi R] a. VIII, n. 2, 9-16 gennaio 1932, pp. 27-61; *Programmi da lunedì 25 aprile a domenica 1° maggio 1932*, *ibid.*, a. VIII, n. 17, 23-30 aprile 1932, pp. 37-69; *Programmi da lunedì 17 ottobre a domenica 23 ottobre 1932*, *ibid.*, a. VIII, n. 42, 16-22 ottobre 1932, pp. 39-65; *Programmi da domenica 1 ottobre a sabato 7 ottobre 1933*, *ibid.*, a. IX, n. 40, 1-8 ottobre 1933, pp. 29-68.

⁷⁶ Per quanto detto si vedano: *Il «Cantuccio dei bambini»*, R, a. VIII, n. 32, 6-13 agosto 1932, p. 3; *Il cantuccio dei bambini*, EIAR, «Annuario dell'anno XIII». *Dieci anni di radio in Italia*, 1935, pp. 323-328. In entrambi gli articoli citati si dà conto della programmazione radiofonica per ragazzi di quegli anni.

⁷⁷ Cfr. *Piano del «Cantuccio dei bambini» milanese*, RO, a. V, n. 39, 22 settembre 1929, p. 9. Su Margadonna e la radio, in periodo fascista, si vedano i cenni in Isola, *Abbassa la tua radio per favore*, cit., p. 46 e 104.

⁷⁸ Cfr. V.E. Bravetta, *Voci care ai fanciulli. Nonno Radio, Zia Radio e Mago Blu*, R, a. VI, n. 13, 29 marzo-5 aprile 1930, p. 45.

si riescono a reperire informazioni più precise in ordine al tipo di letture scelte. Sappiamo, ad esempio, che nel 1932 e nel 1933⁷⁹ il venerdì venivano narrati brani delle fiabe di Lucilla Calfus Antonelli, autrice di romanzi e scrittrice di opere per ragazzi. Nello specifico risultano in scaletta in questo periodo *Una capretta e un bambino*, *La lepre e la tartaruga*, *Le farfalle*, poi rifuse nell'opera *Chiacchiere con le bestie*⁸⁰.

Sulla base delle notizie raccolte non è facile precisare il livello di pervasività dei contenuti fascisti nella proposta fatta dall'emittente ambrosiana per i ragazzi. Rimane vera, anche per questi anni, la differenza fra questa proposta e quella della stazione di Roma che mandava ancora in onda *Il Giornalino del fanciullo* di Cesare Ferri e che non modificava i contenuti e l'impostazione rispetto alla fase iniziale⁸¹. Il programma appariva perfettamente in sintonia con il contesto politico dell'epoca come e forse più del passato. Nel 1932, ad esempio, al fine di celebrare il X anniversario dell'era fascista, «Nonno Radio» avviava un nuovo «concorso aviatorio», che, anche in questo caso, otteneva il plauso di Italo Balbo che assicurava la collaborazione del Ministero dell'aeronautica. Rispetto alle edizioni precedenti, il tema era molto più difficile e richiedeva conoscenze tecniche specifiche. Tra i premi in palio veniva data immediata pubblicità a quelli messi a disposizione dal ministro Balbo, consistenti in biglietti di aereo per viaggi in località italiane e nelle Colonie. Questo il titolo del tema:

Immaginate di avere a vostra disposizione un aeroplano (apparecchio da turismo) ed organizzate con la vostra fantasia un viaggio da Roma all'Estremo Oriente, oppure da Roma a Città del Capo. Descrivete il viaggio (luoghi e costumi) stabilendo i punti di scalo e di rifornimento tenendo conto delle possibilità di resistenza vostre e del vostro apparecchio che avrete scelto fra i tipi fabbricati dall'industria italiana⁸².

Potevano partecipare fanciulli e giovinetti di ambo i sessi, di ogni ordine di scuola. Viste le indubbie difficoltà a padroneggiare il tema, era bandito nel contempo un altro concorso che chiedeva di descrivere le bellezze, gli usi e i costumi, le leggende e la storia delle diverse regioni italiane.

È da notare non solo il più alto livello di complessità del concorso rispetto a quelli precedenti sull'aviazione, ma anche che per la prima volta i partecipanti dovevano dichiarare, oltre alle proprie generalità, il numero della tessera di iscrizione alle organizzazioni giovanili. Ovvero in questo caso, poteva non

⁷⁹ Per queste notizie si rinvia a *Programmi da lunedì 17 a domenica 23 ottobre 1932*, R, a. VIII, n. 42, 16-22 ottobre 1932, pp. 39-65; *Programmi da lunedì 22 a sabato 27 maggio 1933*, *ibid.*, a. IX, n. 21, 21-28 maggio 1933, pp. 27-47; *Programmi da domenica 1 a sabato 7 ottobre 1933*, *ibid.*, a. IX, n. 40, 1-8 ottobre 1933, pp. 29-68.

⁸⁰ L. Antonelli, *Chiacchiere con le bestie*, Sesto San Giovanni (MI), A. Barion, 1935. Su di lei si veda la voce curata da S. Fava in DBE, vol. 1, pp. 244-245.

⁸¹ Cfr. Bravetta, *Voci care ai fanciulli. Nonno Radio, Zia Radio e Mago Blu*, cit.

⁸² *Le vacanze dei nipoti di Nonno Radio. Un concorso aviatorio sotto gli auspici del Ministero dell'aeronautica. Il diario delle vacanze estive. La gara della promozione*, R, a. VIII, n. 32, 6-13 agosto 1932, p. 19.

essere indicato il numero di licenza di abbonamento, purché il partecipante inviasse il proprio lavoro tramite la direzione della scuola frequentata o della sezione dell'ONB di appartenenza. Insomma per festeggiare il X anniversario della marcia su Roma si voleva estendere il più possibile la platea dei ragazzi coinvolti nella mobilitazione radiofonica, nella consapevolezza che il possesso della radio rappresentava ancora un fenomeno elitario nell'Italia dei primi anni Trenta. D'altro canto la partecipazione al concorso non era limitata agli iscritti alla «Nipoteria» – come avveniva di solito – ma era estesa a tutti gli aderenti ai diversi gruppi di ascolto delle stazioni radiofoniche italiane, proprio in ragione dell'importanza dell'evento.

Va rilevato, peraltro, che a differenza di quanto constatato per la seconda metà degli anni Venti, dagli inizi degli anni Trenta emerge una maggiore attenzione da parte del fascismo alla programmazione della radio per i ragazzi. Si nota cioè una maggiore consapevolezza della valenza educativa di questo nuovo mezzo di comunicazione. Non a caso, presentando i programmi per i più giovani nella primavera del 1930 e nello specifico *Il Giornalino* romano e *Il Cantuccio* milanese, il «Radiocorriere» paragonava la radio a una «famiglia armoniosa» in cui i bambini avrebbero sentito «ogni tanto una voce, per solito soave, farsi grave e, nelle ore solenni della Patria, [ricordare] il comandamento contenuto nel Messaggio che il Duce [aveva affidato] al 'Giornalino'» che li richiamava al loro dovere di custodire la «nuova eroica civiltà» che il fascismo stava edificando nel Paese⁸³. Ovvero il mandato affidato a Cesare Ferri nel 1926 ora passava in consegna a tutte le stazioni, anche a quelle che sembravano conservare una proposta culturale e di svago meno allineata con il corso politico del momento.

Come accennato prima, la programmazione dalla stazione milanese era condivisa per alcuni giorni della settimana dalle altre stazioni del Gruppo Nord, ognuna delle quali però nasceva con un proprio protagonista e un proprio programma, insomma con una propria identità. La prima stazione coinvolta nella trasmissione di programmi unificati fu quella di Torino. Dal 5 settembre del 1929 il capoluogo piemontese mandava in onda per i ragazzi il *Gaio-Radio-Giornalino* (dal 1932 *Radio Giornalino*) condotto da Spumettino che così si presentava agli ascoltatori nel corso della prima puntata:

Sono nato sull'onda della Radio Torino e, per giungere alle vostre orecchie, mi valgo della voce della mia fida alleata Bollicina la quale, per molti motivi, ha la lingua più sciolta della mia. L'età di Spumettino batte, leggermente, sui duecento anni, ma li porta bene: un po' su di una spalla un po' sull'altra. È invisibile ad occhio nudo e crudo e sempre lo sarà per tutti voi. Potete dunque immaginarlo come a voi piace⁸⁴.

⁸³ Bravetta, *Voci care ai fanciulli. Nonno Radio, Zia Radio e Mago Blu*, cit.

⁸⁴ *Voci care ai fanciulli. Nel regno luminoso di spumettino. Bollicina fata dell'aria. Chi è ser Faggino. La farfalla azzurra e l'aratro d'oro*, R, a. IV, n. 24, 14-21 giugno 1930, p. 44. Si vedano anche le notizie raccolte in *Il cantuccio dei bambini*, EIAR, «Annuario dell'anno XIII». *Dieci anni*

Spumettino era uno degli pseudonimi usati da Giuseppe Eugenio Chiorino (1871-1941), in arte noto anche come Gech, esponente della «Scapigliatura» torinese del primo Novecento connotata da interessi eclettici, come, appunto, la produzione di Chiorino che si mosse fra il cinema e la radio, il giornalismo e la redazione e l'illustrazione di testi per l'infanzia. Collocandosi nel solco della migliore tradizione del giornalismo per ragazzi, collaborò tra l'altro con «La Domenica dei fanciulli» e il «Corriere dei piccoli» e i suoi testi rivelano «capacità di coinvolgimento, autoironia, creatività»⁸⁵. Nei due spazi settimanali a lui riservati dalla stazione torinese, in questi anni programmati il giovedì (giorno in cui non vi erano lezioni a scuola) e la domenica o il lunedì, egli intratteneva i più piccoli con concorsi (il primo indetto poneva il seguente quesito: «Quale differenza passa tra caramella e la radio»), indovinelli, lettura di fiabe, conversazioni su argomenti di botanica e di storia naturale.

Lo aiutavano nel programma altri personaggi, quali la già citata *Bollicina*, ovvero l'annunciatrice Hortensia Targhetta, e nella narrazione delle fiabe *Ser Faggino* (un nano che viveva nei boschi e che conosceva tutti gli esseri che li animavano), altra firma da lui usata e personaggio delle fiabe da lui stesso scritte e raccontate alla radio. La natura rappresenta il tema di queste sue storie che sottolineano i benefici e la salubrità fisica e morale della vita rurale a dire il vero non in modo pedante, ma con leggerezza e capacità di appassionare il lettore⁸⁶. Le cronache delle sue trasmissioni ci restituiscono però una più esplicita intenzionalità educativa che facilmente trovava sbocco nell'enfasi e nella difesa fascista della ruralità, come il «Radiocorriere» sottolineava. Sintomatico il saluto rivolto ai piccoli all'ascolto della prima puntata:

Giunga questo mio primo saluto nelle borgate vicine e lontane; cerchi i casolari smarriti nella vastità dei campi o sui greppi montani. [...] Li vedo questi ascoltatori, bimbi, fanciulli, giovinette dalle manine già attive che hanno il colore sano del pane casalingo, che hanno il colore sacro della Grande Madre, sulla quale si chinano nella prima fatica con atto che sa di riverenza. Oh, lasciate, lasciate, giovani amici, che anche più la vostra pelle s'imbruni; lasciate che l'aratro d'oro del sole scavi, più avanti, sulla fronte serena i solchi quelli dei vostri campi fecondi. Mai vi punga la brama di abbandonare l'ombra del vostro campanile, per vivere in quella, piena d'affanni, di queste prigioni di ferro e di cemento. Restate con la Grande Madre Terra. Ascoltate il palpitar segreto delle viscere feconde; il suo aroma che dal verde manto, attorno attorno si diffonde. Voi conservatevi degni di tanta Madre. Il sudore vostro sarà il bacio filiale [...]. Sudore non meno santo delle stille con le quali il sacerdote benedice la vostra casa, la vostra terra, i raccolti, il bestiame⁸⁷.

di radio in Italia, 1935, pp. 323-328.

⁸⁵ P. Vagliani, *Chiorino Giuseppe Eugenio*, in DBE, vol. 1, p. 342.

⁸⁶ Chiorino raccolse le fiabe narrate alla radio negli anni Trenta in alcuni volumi. Si segnalano: Baffo di gatto, *Radioleggende di Spumettino. Trasmesse dall'EIAR. Radio Torino*, Torino, Paravia, 1934; Baffo di Gatto, *Radiofiabe di Spumettino. Trasmesse dall'EIAR. Radio Torino*, Torino, Paravia, 1934.

⁸⁷ *Voci care ai fanciulli. Nel regno luminoso di spumettino. Bollicina fata dell'aria. Chi è ser Faggino. La farfalla azzurra e l'aratro d'oro*, cit., p. 44. Così chiosava il saluto di Spumettino il

Anche in questo caso i piccoli ascoltatori erano raccolti in gruppo e costituivano la «rete azzurra». Forte fu il successo riscosso da Chiorino, come documentato dalle numerosissime lettere ricevute (circa 70.000 nel giro di tre anni) e alle quali, in parte, rispose firmandosi «Baffo di gatto» (dal nome della spirulina degli apparecchi a galena) sul «Radiocorriere» in una pagina dapprima senza titolo, poi denominata «Pagina dei ragazzi» e dal 1931 «Radiofocolare»⁸⁸.

Altro programma, delle stazioni del Gruppo Nord, che ebbe un'importante risonanza fu *Balilla a noi!* mandato in onda dalla stazione di Trieste dal 1° ottobre 1931. Il titolo, *l'Inno del Balilla* come sigla di apertura e chiusura, i contenuti documentano la piena identificazione della trasmissione con il clima politico⁸⁹. Il conduttore era «Mastro Remo», ovvero il giornalista Mario Granbassi (1907-1939) ai tempi capocronista del «Piccolo» di Trieste, di fede fascista, morto come volontario in Spagna⁹⁰. L'incarico di seguire le trasmissioni per ragazzi della stazione triestina gli fu dato dal reggente della stazione, Renato Mori che gli passava in consegna anche il nome d'arte, «Mastro Remo» – composto delle prime sillabe del suo nome –, con il quale egli stesso aveva condotto il *Cantuccio* prima a Genova e poi a Bolzano⁹¹. In quelle due realtà, Mori aveva dato vita a uno degli intrattenimenti radiofonici per ragazzi destinato a avere longeva e grande fortuna, anche a fini didattici, grazie soprattutto all'impegno e alla vitalità di Mario Granbassi. Si trattava del radiodisegno: i più piccoli all'ascolto dovevano ricostruire, su una pagina di un quaderno a quadretti, il disegno di un oggetto non noto che si palesava via via, sulla base delle indicazioni dettate al microfono.

Radio Trieste mandava in onda *Balilla a noi!* due volte la settimana: il lunedì con giochi, indovinelli, canzoni e «radionovelle» per i più piccoli, e il giovedì

«Radiocorriere»: «[Spumettino] vuole che i figli dei campi restino figli dei campi e non cedano alle lusinghe della città... Grande è la potenza della radio, la quale istantaneamente diffonde voci e suoni. Queste voci possono essere un potente mezzo di diffusione del Programma del Duce, il quale vuole il rispetto all'albero, l'amore alla terra»: *ibid.*

⁸⁸ Il «*Cantuccio dei bambini*», R, a. VIII, n. 32, 6-13 agosto 1932, p. 3.

⁸⁹ Cfr. M. Granbassi, *Mastro Remo si confessa*, prefazione di S.E. Renato Ricci, Bologna, Cappelli, 1932, p. 27 che, insieme alle notizie tratte dalle «Radiocorriere» costituisce una fonte importante per ricostruire le attività di questo programma. Nelle note che seguono verranno date ulteriori indicazioni, ma sulla coerenza del programma con il clima politico, si veda anche L. Vardabasso, *Combricolini di Radio-Trieste*, R, a. IX, n. 30, 23-30 luglio 1933, p. 15, dove si dà conto della trasmissione andata in onda dall'auditorio di Radio Trieste che aveva visto come protagonisti i beniamini del programma radiofonico e che aveva ospitato il «Teatrino dei Balilla», mandato in onda ogni sabato a cura del Comitato provinciale dell'ONB.

⁹⁰ Su di lui si vedano la voce curata da C. Desinan in DBE, vol. 1, pp. 682-683; F. Salimbeni, G. Granbassi, C. Meriani, *Mastro Remo. Trieste, 24 marzo 1998*, Trieste, Circolo della Cultura e delle Arti, 2000.

⁹¹ Cfr. Granbassi, *Mastro Remo si confessa*, cit., pp. 5-6; sulla presenza di «Mastro Remo» presso le stazioni di Genova e Bolzano cfr. RO, a. V., n. 2, 6 gennaio 1929 per la programmazione radiofonica della prima settimana di gennaio del 1929; V.E.B., *La radio e i fanciulli*, R, a. VI, n. 27, 6-12 luglio 1930, p. 5.

con il gioco del disegno⁹². Periodicamente erano organizzati «radiatoraduni» in città, quali quello dell'estate del 1932 per la fine del primo «anno scolastico» di trasmissione in cui gli ascoltatori del programma, chiamati «combriccolini»⁹³, marciarono vestiti con la divisa da Balilla o da Piccola italiana fino alla stazione radio. Qui era stata celebrata la messa da campo e, alla fine del rito, dopo un breve discorso, «Mastro Remo» aveva consegnato i premi previsti ai giovani presenti. La cerimonia si era chiusa con l'esecuzione di inni fascisti e di canti di trincea⁹⁴.

Balilla a noi! riscosse un immediato successo, come testimoniato anche in questo caso dalla copiosa corrispondenza inviata a «Mastro Remo» in risposta al gioco del disegno. Più di 2.000 furono le lettere ricevute dopo la prima puntata⁹⁵ in cui il disegno «dettato» rappresentava «un Balilla paffutello, col suo bravo fez sulle ventitré e un'aria sbarazzina»⁹⁶. Come si è detto, fin dagli inizi era intenzione dei conduttori costruire attorno alla stazione la grande famiglia dei piccoli ascoltatori, i «combriccolini». È da notare che, grazie al nuovo gioco introdotto, il programma si impose all'attenzione degli ascoltatori non più solo come singoli, ma come gruppo: in specie furono le scolaresche, prima ancora che la radio entrasse nelle classi per volontà del regime, che si sintonizzarono su Radio Trieste grazie ai loro maestri che colsero nel «radiodisegno» una forma istruttiva di svago che suscitava l'attenzione degli alunni facendoli divertire nel contempo⁹⁷.

La partecipazione attiva dei ragazzi è documentata dalla rievocazione che Granbassi fece, con leggerezza e ironia, del primo anno di quella esperienza nel libro già segnalato *Mastro Remo si confessa*. Egli vi raccolse foto della trasmissione – che peraltro, con quelle dei bambini come pure di altri programmi, abbondavano sulle riviste dell'URI e dell'EIAR – ma anche alcuni dei disegni radiofonici dettati, brani delle composizioni e delle lettere inviate dai più piccoli alla redazione.

⁹² Granbassi, *Mastro Remo si confessa*, cit., pp. 83-89.

⁹³ Scriveva Granbassi che i «combriccolini» erano gli amici del programma, raccolti in una scuola, in una Casa Balilla, in una famiglia e poi precisava: «Ma se il vocabolo e i suoi derivati si possono usare scherzosamente, a questo o a quel proposito, i bravi amici di Mastro Remo non devono dimenticare che essi sono soltanto degli Avanguardisti e dei Balilla, delle Giovani e Piccole Italiane, e nient'altro. Perché la loro famiglia radiofonica si chiama «Balilla, a noi!», perché il saluto d'apertura e di chiusura del nostro cantuccio è l'inno dell'Opera Nazionale Balilla, è l'alalà del Duce e di tutte le Camicie nere d'Italia»: *Mastro Remo si confessa*, cit., p. 77.

⁹⁴ I «Combriccolini» a Monte Radio, R, a. VIII, n. 28, 9-16 luglio 1932, p. 12.

⁹⁵ Granbassi, *Mastro Remo si confessa*, cit., p. 21.

⁹⁶ *Ibid.*, p. 15. Per come si svolgeva il gioco, si veda la descrizione fatta da un piccolo radioascoltatore: *ibid.*, pp. 13-14.

⁹⁷ Cfr. Granbassi, *Mastro Remo si confessa*, cit., p. 26, pp. 50-52; ma si veda anche: Il balilla triestino, *Nel regno di Mastro Remo*, R, a. VII, n. 51, 19-26 dicembre 1931, p. 14, che segnalava il caso di un maestro di una classe V mista della provincia di Rovigo che, con i suoi alunni, seguiva le due puntate settimanali di «Mastro Remo» a casa dell'unico concittadino che possedeva la radio e che la metteva gentilmente a disposizione della scuola.

Si tratta di testi che documentano l'allineamento al progetto educativo del fascismo, e non poteva essere diversamente. Alcuni di loro lasciano però trasparire la spontaneità infantile che Granbassi non censurava. Significativi sono, in proposito, i testi di alcuni degli scritti inviati in risposta al concorso, mandato in onda nei primi mesi del 1932, dal titolo *Perché amo il Duce*. Tutti quelli pubblicati ripropongono gli schemi tipici delle lettere scritte al Duce da bambini⁹⁸. Uno di loro però non asseconda completamente il tono retorico proprio di questa produzione e fa emergere sprazzi di spontaneità. Si tratta della composizione di Alberto Nani, di San Vito Chietino, che vinceva il «premio originalità». Egli scriveva:

Amo il Duce per parecchi motivi. Prima perché ha creato i Balilla, ed io ogni volta che mi vesto da Balilla con la camicia nera, la *gravatta* azzurra e il fez, mi sento di essere già un soldato. Poi perché quasi sempre ho visto il suo ritratto in mezzo ai bambini e ho pensato che il nostro Duce ama molto i bambini. Lo amo perché Egli notte e giorno lavora per la patria come sento nei discorsi di famiglia. Lo amo perché ha fatto la bonifica dell'Agro romano, e papà ogni volta che è scontento per la crisi, dice che vuole andare anche lui a lavorare quella terra. E l'amo ancora più di tutto perché la mamma mia, che è grassa e sempre pensava come dimagrire, poi l'altro giorno ha letto nel giornale il discorso che il Duce ha fatto ai medici, che la donna grassa non è brutta, ma è una buona cosa per la razza, così ora la mamma mangia ed è tranquilla⁹⁹.

Insomma se indubbiamente il programma si caratterizzava per l'aperta adesione al fascismo, non va misconosciuta la capacità di Granbassi di entrare in sintonia con i ragazzi, di sapere individuare modalità nuove di intrattenimento specifiche per la radio – si pensi al disegno radiofonico – in grado di coinvolgere i più giovani. Si deve a questa sensibilità la valorizzazione e il lancio, nel corso della sua trasmissione, della fiaba musicale per il teatro *Il reuccio e il suo cruccio* della poetessa istriana Maria Del Monaco Gioitti, in seguito messa in scena in molte città italiane, in Europa e in America Latina¹⁰⁰.

Completavano il quadro delle stazioni del gruppo Nord Genova e Firenze. Anche il capoluogo ligure si dotò di un proprio spazio per i bambini che denominò «La palestra dei piccoli» previsto il giovedì pomeriggio, per mezz'ora, fa le 16 e le 17. Dopo una breve presenza nel 1929 di Renato Mori, come «Mastro Remo», all'interno di questo spazio¹⁰¹, a partire dall'autunno del 1930, la figura protagonista fu «Fata Morgana»¹⁰². La pubblicitaria dell'epoca,

⁹⁸ A. Wingenter, «*Vi saluto romanamente!*». *Self-narration and performance in children's letters to Mussolini*, «History of Education & Children's Literature», vol. 7, n. 1, 2012, pp. 241-259.

⁹⁹ Granbassi, *Mastro Remo si confessa*, cit., pp. 138-139.

¹⁰⁰ *Ibid.*, pp. 225-228. Per informazioni biobibliografiche su questa scrittrice per l'infanzia si rinvia alla puntuale scheda redatta da C. Desinan in DBE, vol. 1, p. 470.

¹⁰¹ Si rinvia alla programmazione in onda fra lunedì 7 e domenica 13 ottobre: RO, n. 41, 6 ottobre 1929.

¹⁰² Cfr. *Programmi di giovedì 18 settembre 1930*, R, a. VI, n. 37, 13-20 settembre 1930, p. 29.

in questo caso, non svela l'identità di questo nuovo personaggio radiofonico e quindi non ci aiuta a capire il progetto perseguito, tuttavia il nome scelto ancora il programma al mondo fantastico delle fiabe¹⁰³. Esso era in onda due volte la settimana, il lunedì e il giovedì, mentre negli altri giorni, Genova trasmetteva *Il Cantuccio dei bambini*, in collegamento con le altre stazioni del gruppo.

Come si è visto, Radio Firenze fu l'ultima del gruppo Nord, in ordine di tempo, a entrare in funzione. Inaugurata il 21 aprile del 1932, subito introduceva un proprio personaggio anch'esso proveniente dal mondo della fantasia, «Fata Dianora», ospite del *Cantuccio dei bambini* il giovedì¹⁰⁴. Anche in questo caso non sappiamo da chi fosse impersonata, sappiamo però che si presentava ai più giovani in ascolto arrivando su una nuvola verde, accompagnata da «Spiritello», piccolo demonietto che si divertiva a farli confondere con giochetti bizzarri, e da «Formichetta», che invece dispensava caramelle e cioccolatini ai bambini che fossero stati presenti in studio¹⁰⁵.

Lo stesso «Radiocorriere» analizzava le ragioni anche psicologiche del proliferare di queste figure fantastiche che animavano le trasmissioni per i più piccoli. Esso notava come, al confronto della semplice lettura di fiabe che avevano come protagonisti maghi e fate, tramite la radio, le fate e i maghi parlavano direttamente ai bambini; tale evoluzione rispetto al passato non era contraria alla psicologia dell'infanzia perché «il sogno [aveva] la massima parte» nella «quotidiana, fanciullesca realtà vitale». Anzi i bambini del tempo potevano aprirsi al mondo della fantasia più di quanto avessero potuto fare in precedenza i loro fratelli più grandi perché, grazie al microfono, i protagonisti delle fiabe incontravano ciascun bambino individualmente¹⁰⁶.

Ben presto, ovvero dall'autunno del 1932, la programmazione di Firenze si popolò di altre figure. Il lunedì conduceva «Nano Bagonghi», «dalla lunga barba fluente e candidissima» che veniva, come i bambini apprendevano dai microfoni, «dall'illustre paese di Bagonghia, portato dal suo fedele destriero» di nome Cirillino, «meraviglioso somarello, che [correva] alla velocità di tre chilometri l'ora per giungere puntualmente come il cronometro [...] [esigeva]». Il personaggio destò fin dagli inizi la fantasia dei bambini che si sbizzarrirono nella sua descrizione con disegni o testi scritti, inviati alla redazione:

¹⁰³ Nel caso della stazione di Genova, più di altre, l'indagine si scontra con la difficoltà cui si è accennato agli inizi del saggio: gli studi sui programmi radiofonici italiani per ragazzi e per usi didattici non ha avuto sinora molti cultori e, d'altro canto, le ricerche di letteratura per l'infanzia – da cui provengono molti dei conduttori individuati per gli anni di cui si sta trattando – non hanno ancora prestato la dovuta attenzione alla produzione predisposta per questo mezzo di comunicazione.

¹⁰⁴ *Programmi da lunedì 25 aprile a domenica 1° maggio 1932*, cit.

¹⁰⁵ Il segretario di turno, *Il «Cantuccio dei bambini» di Radio Firenze*, R, a. IX, n. 28, 9-16 luglio 1933, p. 10. Si veda anche *Il cantuccio dei bambini*, EIAR, «Annuario dell'anno XIII». *Dieci anni di radio in Italia*, 1935, p. 328.

¹⁰⁶ Il segretario di turno, *Il «Cantuccio dei bambini» di Radio Firenze*, cit., p. 10.

Un Nano – commentava il «Radiocorriere» – è qualcosa che ispira loro confidenza, perché in fondo è un uomo, ma un uomo speciale, ecco, che si mette involontariamente all'altezza dei bimbi e qualche volta più basso di loro, che possono così prendersi il gusto sopraffino di guardarlo dall'alto in basso. Gli scrivono e non vedono alcun male nel confessare che dalla voce lo immaginano brutto, ma buono, tanto buono e, cosa curiosa, spesso lo vedono gobbo¹⁰⁷.

La fantasia, tuttavia, non era l'unico spazio vitale riconosciuto dalla radio all'infanzia dell'epoca; anche la quotidianità ne era protagonista. E così «Nano Bagonghi» e «Fata Dianora» non solo raccontavano di sé, rispondendo ai «cantuccini» (come erano denominati gli ascoltatori della stazione, evocando il nome dei biscotti toscani) che chiedevano di loro, proponevano giochi enigmistici, narravano storie, riprendevano con gentilezza, chiamandoli per nome, chi aveva compiuto qualche piccola mancanza segnalata dai familiari, ma li coinvolgevano anche nella celebrazione delle ricorrenze nazionali (giornata della vittoria, marcia su Roma), rivolgendosi a loro come Balilla, Avanguardisti, Piccole e Giovani Italiane. In occasione del ricordo della marcia su Roma, raccontava il «Radiocorriere»:

invitati dalla voce amica [...] ad osservare un minuto di silenzio in cui il pensiero sia riverentemente rivolto alla memoria dei caduti per la causa della Rivoluzione, scattano davanti all'apparecchio, anche se sono soli nella stanza, seri e fieri, Balilla e Piccole Italiane, sull'attenti o irrigiditi nel saluto romano, attendono che la voce avverta essere trascorso il minuto; e mamme e babbi e nonni scrivono stupiti e commossi dell'obbediente compunzione con cui hanno visto i loro bimbi compiere l'austero rito¹⁰⁸.

Insomma il nuovo mezzo di comunicazione aveva il pregio di mettere ogni singolo bambino in dialogo diretto con il mondo del fantastico, ma questa esperienza non doveva tradursi in una fuga dalla realtà. Era questa un'avvertenza pedagogica seguita tradizionalmente da buona parte delle letture proposte ai più piccoli¹⁰⁹. Gli autori di testi, i conduttori che cominciavano a lavorare alla radio si rendevano però conto che essa poteva fare arrivare, in modo più coinvolgente della lettura, il messaggio politico ai bambini attraverso i protagonisti di quel mondo di fantasia che della loro vita era parte.

Dal 1933, *Il Cantuccio* di Firenze si arricchì di altre presenze molto note ai più giovani¹¹⁰. Innanzitutto poté avvalersi del contributo di Yambo,

¹⁰⁷ *Ibid.*

¹⁰⁸ *Ibid.*

¹⁰⁹ Su temi, filoni e protagonisti della letteratura per l'infanzia fra Otto e Novecento si rinvia a R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 2003; P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2010; A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento. Volume I*, Milano, FrancoAngeli, 2017; A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento. Volume II*, Milano, FrancoAngeli, 2018.

¹¹⁰ Cfr. Il segretario di turno, *Il «Cantuccio dei bambini» di Radio Firenze*, cit., pp. 10-11.

ovvero Enrico Novelli, prolifico e eclettico scrittore e illustratore di libri per ragazzi, che dai microfoni narrava storie fantastiche e avventurose, dialogando con «Ciuffettino», il monello dal caratteristico ciuffo da lui creato e che lo «accompagnava» anche in trasmissione¹¹¹. Nel corso dell'anno intervenne al programma anche Collodi Nipote (alias Paolo Lorenzini) che, il giovedì pomeriggio, intratteneva i ragazzi in racconti e divagazioni¹¹².

La programmazione delle stazioni del Sud appare decisamente meno ricca, se si fa eccezione per Roma che, come si è visto, mandava in onda il *Giornalino del fanciullo* di Cesare Ferri dal lunedì al sabato secondo un'impostazione consolidata, con i concorsi, la corrispondenza, le azioni benefiche a favore dei ragazzi malati o bisognosi, le gite, le adunate della «Nipoteria» e la partecipazione alla ritualità fascista. Napoli continuava a trasmettere *Bambinopoli* il giovedì e la domenica (ovvero nei giorni i cui non vi erano le lezioni a scuola), sempre condotto da «Nonnina Radio»¹¹³. In sintonia con l'indirizzo già dato nella seconda metà degli anni Venti, esso puntava a intrattenere i ragazzi con giochi, concorsi, letture che avessero anche una finalità istruttiva, nella convinzione che il compito della radio fosse quello di rinforzare la funzione educativa già svolta dalla famiglia e dalla scuola. Dal 1933, allorché fu possibile tecnicamente, il capoluogo partenopeo mandò in onda per due giorni durante la settimana il *Giornalino del fanciullo* di «Nonno Radio» traghettando così la programmazione verso una maggiore connotazione politica.

Inaugurata il 14 giugno del 1931, anche la stazione di Palermo si attrezzava per rivolgersi ai più giovani e prevedeva, ma solo il giovedì pomeriggio, il *Cantuccio dei Bambini* animato da «Fatina radio» che coinvolgeva i ragazzi nelle risposte alla corrispondenza, nel lancio e nella soluzione di concorsi¹¹⁴. Insomma, anche se le notizie relative alla fase di avvio sono scarse, sembra che la stazione avesse una programmazione volta all'intrattenimento più che alla formazione politica. Ciò trova conferma nella festa organizzata dal *Cantuccio* palermitano per la fine dell'anno scolastico nell'estate del 1932 sulla spiaggia di Mondello alla presenza di numerosissimi piccoli e grandi ascoltatori¹¹⁵. Nel corso della giornata, condotta da «Fatina Radio», vi erano state l'esecuzione di canzoni del folklore siciliano e la messa in scena del teatro dei pupi. Al

¹¹¹ La notorietà di Yambo era tale che, in questo caso, fu la trasmissione fiorentina a essere trasmessa in collegamento con le stazioni di Milano, Torino, Genova e Trieste. Su Yambo si vedano Boero, De Luca, *La letteratura per l'infanzia*, cit., ad indicem; la voce curata da S. Assirelli in DBE, vol. 2, pp. 247-248.

¹¹² Su P. Lorenzini cfr. Boero, De Luca, *La letteratura per l'infanzia*, cit., pp. 124-128; nonché la scheda biobibliografica curata da W. Fochesato in DBE, vol. 2, p. 52.

¹¹³ Per le attività della stazione campana nei primi anni Trenta si rinvia a V.E.B., *La radio e i fanciulli*, R, a. VI, n. 27, 6-12 luglio 1930, p. 5; *Festa di bimbi a Radio-Napoli*, *ibid.*, a. IX n. 27, 2-9 luglio 1933, p. 14.

¹¹⁴ Si veda, ad esempio, la programmazione degli inizi di gennaio del 1932 in: *Programmi da domenica 10 a sabato 16 gennaio 1932*, R, a. VIII, n. 2, 9-16 gennaio 1932, pp. 27-61.

¹¹⁵ Si veda: *I bimbi del «Cantuccio» in festa a Palermo*, R, a. VIII, n. 30, 23-30 luglio 1932, p. 10.

pomeriggio i grandi si erano divertiti nelle danze sulla terrazza dello stabilimento balneare che aveva ospitato la festa. I bambini presenti, che avevano la tessera del *Cantuccio*, avevano ricevuto libri in dono e – precisavano gli organizzatori – non si era trattato di grammatiche o di vocabolari, ma di opere che potevano essere lette «sulla spiaggia dorata di Mondello».

Caratterizzava questo evento un'atmosfera completamente diversa da quella, ad esempio, della festa tenutasi a Trieste in quella stessa estate per lo stesso motivo. La giornata friulana, segnata dal ricordo della Grande Guerra, aveva visto i «radiobalilla» marciare, partecipare alla messa da campo, ascoltare discorsi che li richiamavano ai loro doveri nei confronti della nazione. Non erano mancati in quella occasione il divertimento e lo svago, ma era prevalsa la mobilitazione per la patria. La festa palermitana appare invece decisamente mondana, più interessata a divertire con leggerezza che a indottrinare. Significativo il commento del «Radiocorriere»:

Così la popolarità del *Cantuccio*, delizioso rifugio radiofonico dei bimbi siciliani, è ancora cresciuta; Fatina Radio con la sua azzurra bacchetta magica tocca tutti i cuori e li incanta con la sua voce armoniosa, che sa raccontare le belle favole e infondere nell'anima dei piccoli amici i sentimenti migliori di bontà e di gentilezza, che poi daranno frutti nella casa, nella scuola e nella vita¹¹⁶.

Insomma, agli inizi degli anni Trenta, la radio per i ragazzi vedeva convivere due modelli di intrattenimento rivolti ai ragazzi, in alcuni casi compresenti nelle stesse stazioni¹¹⁷. Un primo modello riconosceva al bambino un proprio spazio popolato da personaggi fantastici che diventavano i protagonisti dei programmi e i beniamini dei più piccoli («Mago Blu», «Fata Dianora», Spumettino, «Nano Bagonghi» ecc.), o di figure adulte loro vicine e quasi loro complici («Nonnina radio», «Zia Radio»). In questo caso – si pensi a Milano, ma anche a Napoli, e in parte a Firenze e a Torino – lo stesso mezzo di comunicazione, ovvero la radio (la scatola magica, la «grotta incantata»), era enfatizzato nella sua componente misteriosa, che poteva trasmettere suoni e voci da lontano e, entrando nelle case, rapire il bambino nelle storie narrate, nelle musiche ascoltate, nei giochi proposti. Come era nella tradizione anche della migliore letteratura per l'infanzia, questo modello era comunque sostenuto da un'intenzionalità educativa volta a formare i più piccoli ai loro doveri di figli, fratelli, alunni, all'amore per la patria, al senso di identità nazionale¹¹⁸.

¹¹⁶ *Ibid.*

¹¹⁷ Si possono vedere in proposito le analisi e le riflessioni di M. Colin relative alla letteratura per l'infanzia durante il ventennio, laddove in specie viene notato l'intrecciarsi dei canoni della precedente letteratura giovanile con quelli proposti dalla nuova letteratura per l'infanzia del ventennio: *I bambini di Mussolini. Letteratura, libri, letture per l'infanzia sotto il fascismo*, Brescia, La Scuola, 2012, pp. 295 ss.

¹¹⁸ In merito sono da vedere almeno gli studi citati nella nota 109.

Vi era poi un secondo modello (si pensi a Trieste e Roma, soprattutto), che non ignorando che nel bambino era labile il confine tra fantasia e realtà e che la fantasia, il senso della scoperta e dell'avventura erano parte della vita infantile, faceva leva anche su questi sentimenti per mobilitare i ragazzi nel sostegno alla nazione fascista, per prepararli e renderli degni del destino che il Duce indicava a tutti gli italiani¹¹⁹. In questo caso la radio appariva un potente alleato delle altre agenzie educative (ONB, scuola, colonie), in quanto se il conduttore era bravo e trovava modalità coinvolgenti (il disegno radiofonico di «Mastro Remo», i concorsi di «Nonno radio») riusciva a fare partecipare attivamente gli ascoltatori, anche se seguivano comodamente dal salotto di casa o dall'aula di scuola.

La consapevolezza dello scarto fra questi due modelli era presente al mondo della radio, nelle sue diverse componenti, e quindi anche agli autori che approntavano testi per i ragazzi da trasmettere dai microfoni. Molto significativa la favola musicale, dal titolo *Anch'io sono un Balilla*, scritta da Ester Valdes¹²⁰. Eseguita a teatro e interpretata da Balilla e Piccole Italiane aderenti a «Bambinopoli», venne mandata in onda da Radio Napoli nella primavera del 1934. Il protagonista era un bambino ancora «avvinto dall'incantesimo delle vecchie storie di maghi e di fate, dei fantastici personaggi del mondo delle leggende, ancora legato da tenero affetto ai primi e più cari compagni di ogni bambino: Pinocchio, Cappuccetto Rosso, Cenerentola». Richiamato dai genitori a staccarsi dal quel mondo di sogni e di fantasie per immergersi negli studi e nella vita reale, il bambino soffriva per il vuoto creato da quel distacco. In sogno gli appariva allora una giovane dama del Settecento che gli faceva vedere «un lembo» del mondo passato e che, nel contempo, gli spiegava che quello non era più il suo mondo né il suo tempo. Ella gli mostrava poi il secolo in cui era chiamato a vivere, il '900, in cui la scienza, l'arte, la musica, la letteratura, la vita civile stavano conoscendo profondi rinnovamenti. «Cosa sono tutte le vecchie favole, le sciocche magie delle streghe e delle fate di fronte al prodigio di una spiga d'oro che spunta fra i campi?», si chiedeva la favola. Al bambino appariva infine in sogno un'altra ragazzina, diversa dalla prima: essa era reale, era una Piccola Italiana che lo invitava a uscire alla luce del sole per seguire il canto dei Balilla. Il racconto si chiudeva con il risveglio del ragazzo da quel lungo sonno: «Via per sempre il passato, le fiabe, i balocchi...Ora il bimbo riappare: è anch'egli un fiero Balilla, orgoglioso della sua camicia nera e del suo moschetto»¹²¹.

¹¹⁹ Sulla mobilitazione dell'infanzia durante il ventennio cfr. A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005, pp. 179 ss.; C. Ghizzoni, *L'infanzia nell'Italia fascista*, in Gecchele, Polenghi, Dal Toso (edd.), *Il Novecento: il secolo del bambino?*, pp. 93-112.

¹²⁰ Cfr. *Una recita a Bambinopoli*, R, a. X, n. 15, 8-15 aprile 1934, p. 15.

¹²¹ *Ibid.*

Il testo sollecitava i bambini italiani a comprendere che nel loro futuro non vi dovevano più essere maghi e fate, ma la divisa e i compiti del Balilla e delle Piccole italiane; la spiga d'oro, simbolo dell'Italia rurale rigogliosa e sobria enfatizzata dal fascismo, andava a soppiantare le «sciocche magie» di cui erano intrise le fiabe. Il racconto però sembra non essere solo rivolto ai ragazzi in ascolto della radio, ma alla radio stessa, agli ideatori e ai conduttori dei programmi per i più giovani, agli autori dei testi da mandare in onda. Esso sottolineava la necessità del passaggio di consegne della vecchia radio (il primo modello di intrattenimento e educativo di cui si è detto) alla nuova radio, i cui protagonisti e destinatari erano i giovani organizzati nelle associazioni del regime e che, oltre a proporre occasioni di svago istruttivo, era chiamata a essere strumento di propaganda.

È interessante, in proposito, quanto annotava nel 1932 il «Radiocorriere» a margine di un esperimento di trasmissione radiofonica dalle colonie di vacanza in Istria per consentire ai genitori di ascoltare «dal vivo» le voci dei loro figli lontani, di sapere «in tempo reale» come trascorrevano le giornate e di smorzare un poco la nostalgia della distanza. Il giornale dell'EIAR rilevava che la radio costituiva un ausilio importante per gli educatori. Nelle scuole, nelle case, nei campeggi essa era diventata o poteva diventare «l'assidua assistente» dei maestri:

segue i ragazzi – vi si legge – là dove essi [i maestri] devono arrestarsi; ne continua il compito e la missione; ed estende, molte volte, la nobile opera di propaganda e di persuasione anche a vantaggio dei genitori, dei fratelli più anziani i quali non hanno potuto godere il beneficio del radio-insegnamento e della radioeducazione¹²².

Negli anni successivi il fascismo si sarebbe preoccupato di sanare l'evidente scarto fra i due modelli pedagogici e di trasmissione radiofonica per ragazzi individuati e di pervenire a una programmazione centralizzata, eguale per tutte le stazioni, chiaramente orientata in senso politico. Nel 1936, nella fascia oraria pomeridiana tradizionalmente destinata ai più piccoli, veniva diffuso su scala nazionale un nuovo «contenitore», il cui titolo, la *Camerata dei Balilla e delle Piccole Italiane*, era decisamente indicativo del cambio di rotta. Nel contempo il governo, oramai consapevole della sua importanza sul piano della propaganda, si sforzava di fare arrivare al maggiore numero di persone possibili la radio, creando occasioni e luoghi di ascolto condiviso per ovviare alle difficoltà di acquisto degli apparecchi radiofonici da parte delle famiglie italiane a causa dei costi. In nome del mandato del Duce «una radio in ogni villaggio», nel 1933 era istituito l'Ente Radio Rurale, che individuava nella scuola elementare rurale uno dei luoghi privilegiati per la fruizione collettiva della radio, per la quale occorreva mettere a punto una programmazione didattica specifica. Iniziava così una seconda fase della storia della radio per ragazzi nel periodo fascista, anch'essa ancora in buona parte da scrivere.

¹²² *Il microfono tra i Balilla*, R, a. VIII, n. 40, 1-8 ottobre 1932, p. 17.

A history of the periodical press for children in Italy during the 19th Century. Part Two*

Anna Ascenzi
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
anna.ascenzi@unimc.it

Roberto Sani
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
roberto.sani@unimc.it

ABSTRACT: Through a vast amount of documents, previously almost unused if not completely ignored by scholars, this paper reconstructs the complex and multiform reality of published periodicals for children in Italy during the 19th century, from the first collections of stories, directed by Pietro Thouar and Raffaello Lambruschini in Florence during the pre-unification period, up to the lively, eye-catching illustrated journals from the end of the century. This work focuses on the foundation during the 19th century in Italy, of different publishing houses specialising in the publication of journals and reviews for children and young people (Florence, Milan, Rome, etc.) and on the role exercised in this sphere, by the editors and/or writers/collaborators of these periodicals, some of whom were among major childhood writers of the period (Pietro Thouar, Luigi Sailer, Carlo Collodi, Emma Perodi, Ida Baccini, *Cordelia*, Ester Bezzola Boni, and Luigi Capuana etc.), and a series of editors destined to fill major roles in the national scenario during the 19th and 20th centuries (Gian Pietro Viesseux, Giacomo Agnelli, Emilio Treves, Edoardo Perino, Licinio Cappelli etc.).

EET/TEE KEYWORDS: History of education; History of children's literature; Journals for children; Italy; XIXth Century.

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4. *A Milanese pole for children's and young people's periodicals at the turn of the 19th and 20th centuries: the «Giornale dei fanciulli» (1881-1901) and «Mondo piccino» (1886-1905) by publishers Emilio Treves and «Frugolino. Giornale dei fanciulli» (1886-1902) by the Educational Reawakening publishing group*

In 1881, the same year in which Ferdinando Martini's «Giornale per i bambini» was being published in Rome and «Cordelia. Giornale delle giovinette italiane» by Angelo De Gubernatis was being published in Florence, while in Milan, publisher Emilio Treves (1834-1916) was producing the «Giornale dei fanciulli. Letture illustrate per l'infanzia», which was edited from the beginning by Achille Tedeschi (1850-1911)¹ and his sister, Virginia Treves Tedeschi, wife of Giuseppe Treves (1838-1904), Emilio's younger brother, known in literary circles as *Cordelia* (1855-1916)².

The arrival of «Giornale dei fanciulli» marked the start of a new stage in the ambitious publishing project, set up by Emilio Treves in 1879, through the creation of a review dedicated to families and entitled «La Pergola. Letture illustrate per le famiglie» (1879-1880). Part of this publication was a whole section – *Per i nostri bimbi* – explicitly intended for children and adolescents. In fact, in 1881, due to the great success of «La Pergola», the editor organised it into four sub-reviews, issued every month³.

Thus, alongside «La Natura. Giornale illustrato di cognizioni utili», «Il Piccolo Cosmos. Raccolta illustrata di viaggi e racconti storici» and «La Ricreazione. Raccolta illustrata di racconti e novelle per le famiglie», there was now a «Giornale dei fanciulli. Letture illustrate per l'infanzia», which, only three years later, in 1884, would have become a completely independent periodical that, under the reconfirmed direction of *Cordelia* and Achille Tedeschi, changed its original look, modifying the monthly publication to weekly, and featuring a rather refined, elegante graphic design and innovative publishing formula. Each issue had 30 pages with two columns, and it stood out for its splendid colour covers by Edoardo Dalbono and for a series of fine illustrations, some of which by the most famous artists and illustrators in Italy for the period⁴.

The group of «literary collaborators» on the Milanese periodical featured the undisputed prestige of such characters, as well as the two directors, *Cordelia* and Achille Tedeschi: Sofia Bisi Albini, Augusto Alfani, Carlo Anfosso, Ida Baccini,

¹ See Achille Tedeschi, «L'Illustrazione Italiana», 17 December 1911, p. 648.

² See S. Bartesaghi, *Cordelia, una carriera di scrittrice fra editoria e letteratura*, «Storia in Lombardia», vol. 10, 1991, pp. 52-95.

³ Cfr. A. Maisano, *Il «Giornale dei fanciulli». La società di fine '800 in una rivista per ragazzi*, «La fabbrica del libro», vol. 15, n. 1, 2009, pp. 9-15.

⁴ Of the numerous illustrators and artists who were «artistic collaborators» on the «Giornale dei fanciulli» between 1881 and 1901, we should mention: G. Amato, V. Bignami, A. Colantoni, E. Dalbono, A. Della Valle, G. Dorè, R. Faccioli, A. Ferraguti, E. Matania, S. Macchiati, Q. Michetti, A. Montalti, D. Paolucci, G. Quaranta, A. Sezanne and, lastly, Ettore and Edoardo Ximenes.

Pietro Battaini, Celestino Calleri, Luigi Capuana, Giulio Carcano, Eduardo Conti, Edmondo De Amicis, Onorato Fava, Enrico Fiorentino, Irene Foroni Conti, Sofia Fortini Santarelli, Samuele Ghiron, Egle Giordano Orsini, Giannina Milli, Felicita Morandi, Gaetano Negri, Policarpo Petrocchi, Giovanni Prati, Giovanni Rizzi, Matilde Serao, Cesira Siciliani, Gaston Tissandier, Arnoldo Usigli and Jesse White Mario.

As well as the classic entertaining columns, such as «Divertimenti della Famiglia» (with puzzles, riddles and word games, etc.) and «Scienza in Famiglia» (medical and scientific education), and the letters of young readers («Salotto di Conversazione»), edited by Achille Tedeschi with the pen name of *Il Nonno*, the «Giornale dei fanciulli» has a wide collection of original texts in every issue. The section «Per i più piccini», especially for young children in the first elementary classes, contains a series of short stories, moral novellas, fables, dialogues, comedies, easily understandable poems and songs, all richly illustrated; while the sections for older readers contain more difficult works such as the novel *Jack & Jane* by Louise May Alcott, serialised during 1884 and then published in book form by Treves the following year⁵, or *Treasure Island* by Robert Louis Stevenson, also serialised in 1885 and then printed in book form the following year⁶, and also tales by Walter Scott and other famous Italian and international writers.

What was awarded a gold medal from the Lega degli Asili Infantili italiani [League of Italian Kindergartens] in 1885, and at the start of the following year was presented to readers as the «the real *giornale dei fanciulli italiani*, a dear friend to our children and our young people»⁷, was also one of the main diffusion channels for young generations in Italy, *self-help* literature, as testified by the many compelling biographies of men who «from nothing were able to raise themselves to the highest levels in all branches of human activity», inspired by *Self Help* by Samuel Smiles, whose Italian version had been printed by Treves a few years earlier (1865)⁸; as well as the serialisation, during 1887, of a genuine

⁵ L.M. Alcott, *Jack & Jane*, adaptation by S. Fortini Santarelli, with 25 illustrations by J. Geoffroy, Milan, E. Treves, 1885.

⁶ R.L. Stevenson, *L'Isola del Tesoro*, translated by Pietro Battaini, illustrations by Giorgio Roux, Milan, E. Treves, 1886.

⁷ «*Giornale dei Fanciulli* edited by Cordelia and Achille Tedeschi is the *giornale dei fanciulli italiani*, a dear friend of our children and young people. It is never found lacking in any cultured, affluent family. With its gentle appearance, within a cover designed by famous Neapolitan painter, Edoardo Dalbono, illustrated by beautiful engravings, this is a genuine luxury publication. Edited with great care by someone who has dedicated a good deal of love to children's literature, it contains a lovely variety of excellent writings and overall, it achieves its purpose of being an intelligent educator. It is amusing and educational, for both the hearts and minds of our young people, inspiring noble sentiment and excellent intentions. A gold medal was awarded by the Lega degli Asili Infantili at a solemn meeting. Its collaborators are among the most esteemed writers and artists in Italy» («*Giornale dei fanciulli. Letture illustrate per l'infanzia*», vol. 6, n. 1 (3 January), 1886, p. 2).

⁸ See (*Self-Help*) *Chi si aiuta Dio l'aiuta ovvero storia degli uomini che dal nulla seppero innalzarsi ai più alti gradi in tutti i rami della umana attività*, di Samuele Smiles, tradotto

classic in *self-help* literature, i.e., the *Les Heros du Travail* by French author Gaston Tissandier⁹.

We should also point out the amount of space given by the «Giornale dei fanciulli» to the narration of episodes from the Risorgimento and to praising the role of the Savoy monarchy in this area¹⁰, through the publication of a series of biographies (Vittorio Emanuele II, Cavour, Garibaldi etc.) and a wide selection of historic and patriotic literature, some of which took the form of ‘monthly tales’ taken from *Cuore* by Edmondo De Amicis (*Il tamburino sardo*, *La piccola vedetta lombarda* etc.).

In June 1889, as already mentioned, in the wake of its notable success all over Italy, the «Giornale dei fanciulli» directed by *Cordelia* and Achille Tedeschi merged with the «Giornale per i bambini», the periodical printed in Rome from 1881, by journalist and politician Ferdinando Martini, who was also initially the editor, followed by Carlo Collodi and then by Emma Perodi.

The acquisition of the glorious Roman title, as well as increasing the number of subscriptions and readers, gave the weekly, published by Emilio Treves the status as most important periodical for children and adolescents in Italy, and perhaps the only one of its kind able to boast, in the late 1880s, a circulation that was truly national and not just among the higher echelons of society, but also among middle-class families.

From the early 1890s, it was possible to see the first signs of the slump that in 1901 would lead to the closure of the «Giornale dei fanciulli» at the end of twenty years of publication. Probably, the gradual increase in running and distribution costs, not compensated by an increase in the number of subscribers, led Emilio Treves to change the publishing strategy followed at this time, focusing completely on the more modest – but certainly less expensive and more profitable – «Mondo piccino. Letture illustrare per i bambini», the publishing group’s other periodical dedicated to children and adolescents.

In fact, from 1886, Treves had decided to add to its aristocratic and refined «Giornale dei fanciulli» (extremely well edited and mainly aimed at young people from the wealthier classes), with a weekly publication for younger readers with a less elaborate appearance and a lower price¹¹, aimed essentially at children from the middle and lower classes.

dall'originale inglese da G. Strafforello con note, Milan, E. Treves, 1865. As is known, the original text was published for the first time in London in 1859, by J. Murray, with the title: *Self-Help: with illustrations of conduct and perseverance*, by Samuel Smiles.

⁹ This work was published again in the same year in book form. Cfr. G. Tissandier, *Gli eroi del lavoro*, Milan, E. Treves, 1887.

¹⁰ See Maisano, *Il «Giornale dei fanciulli». La società di fine '800 in una rivista per ragazzi*, cit., pp. 13-14.

¹¹ It was no coincidence that a year’s subscription to «Giornale dei fanciulli. Letture illustrate per l’infanzia» cost 12 liras and that each issue cost 25 cents, while the annual subscription to «Mondo piccino. Letture illustrare per i bambini» cost only 3 liras, with a single issue costing 5 cents.

This was also edited by *Cordelia* and Achille Tedeschi. «Mondo piccino» consisted of 8-page issues with black and white drawings and illustrations, while its writers included some of the very same who has already worked with the «Giornale dei fanciulli». As well as a series of regular columns, it also contained narrative works – stories, novellas, plays, fairy tales, poems, etc. – already published in volumes in the various series for children and adolescents by Treves:

The review – as Eleonora Bianchi rightly pointed out – had a dual purpose, partly fun and partly educational, aimed at achieving the right combination of «teaching through enjoyment». [...] A close link was established between «Mondo Piccino» and the Treves series for children: on the pages of the former it was in fact usual to see serialisations of texts already published in volumes by the latter, or extracts of same. These were poems and educational plays, fables, fairy tales and fantastic novellas, concluded with an edifying moral, plus tales and novels with a shared educational tendency, which was perfectly in line with the pedagogical spirit behind «Mondo Piccino»¹².

To this end, there are numerous texts published in the «Biblioteca del mondo piccino», «Biblioteca illustrata dei ragazzi» and «Opere illustrate per la gioventù» by Treves, which we then find serialised, a year or two after their publication in book form, in the review edited by *Cordelia* and Achille Tedeschi. It is the case, just to cite a few examples, of some of the works by *Cordelia*, Ida Baccini, Luigi Capuana, Edmondo De Amicis, Emilio Salgari, Augusto Alfani, Rosa Errera and Onorato Fava, reproduced in full or extract form, as well as the novel *Jack & Jane* by Louise May Alcott, published in book form in 1885¹³ and then serialised in «Mondo piccino» during 1894; the novel *L'Isola del tesoro* by Robert Louis Stevenson, published in 1886¹⁴ and partially published in serial form during 1893. There were also two novels by Frances Hodgson Burnett, *Un piccolo Lord*, published for the first time in 1887 and then reproduced in «Mondo piccino» during 1892, and *La povera principessa*, printed in book form in 1889 and then serialised in the review during 1892¹⁵.

In the light of the above, it would seem correct to say that if it is true, as Eleonora Bianchi reminds us, that the «Mondo piccino» was not the «leading children's paper» by Emilio Treves¹⁶, it is equally true that it did play a leading role not only in the promotion and diffusion of narrative works for children printed by Treves, but also in the gradual extension of printed periodicals for children and adolescents to young people in the lower classes.

¹² E. Bianchi, «Mondo piccino» e le collane per l'infanzia della Treves, «La fabbrica del libro», vol. 16, n. 2, 2010, pp. 8-10.

¹³ L.M. Alcott, *Jack & Jane*, adapted by S. Fortini Santarelli, with 25 illustrations by J. Geoffroy, Milan, E. Treves, 1885.

¹⁴ R.L. Stevenson, *L'isola del tesoro*, translation by Pietro Battaini, drawings by Giorgio Roux, Milan, E. Treves, 1886.

¹⁵ F. Hodgson Burnett, *Un piccolo lord*, translated from the English by Pietro Battaini, Milan, E. Treves, 1887; Ead., *La povera principessa. Racconti*, Milan, E. Treves, 1889.

¹⁶ Bianchi, «Mondo piccino» e le collane per l'infanzia della Treves, cit., p. 11.

It is no coincidence that the closure of «Mondo piccino» in 1905 was more due to a general change in business strategy by Treves than to a crisis in the publishing formula or a sudden and significant drop in the number of subscriptions or readers¹⁷.

In the Milan of the last two decades of the 19th century, Emilio Treves was disputing the title of top publisher of children's periodicals with a small but fiercely determined group of teachers and men of education, grouped around scholarly review «Il Risveglio educativo. Monitore settimanale delle scuole elementari» (1884-1901), founded and directed by the teacher and then didactic director from Legnano, Guido Antonio Marcati (1855-1922).

Issued in the mid 1880s and featuring an ambitious project for cultural, pedagogical and didactic renewal in Italian schools with a strictly secular and positivist impression, «Il Risveglio educativo» stood out, from the outset, due to the rigour and vivacity of the scholastic battles conducted in its columns and for the attention it dedicated to improving the legal and economic status of the teaching category and to renewing teacher training:

The periodical – as has been effectively stressed – represented one of the most important, expert journalistic-scholastic publications in the late 19th century. [...] The pages of this Milanese publication contain all of the major problems within the school system in the last part of the century: from debates on recall (for which the paper campaigned) to the Montepension reform, the improvement of teachers' wages to requests to raise training levels (even proposing university courses), requests for more funds for the school to the need for promoting an organised association of schoolmasters at national level. In terms of pedagogy «Il Risveglio» was inspired by the new developments proposed by positivist culture and in particular, it supported the objective method and valorisation of psychology in the service of education. There was also clear support for manual work and agricultural teaching¹⁸.

For the purpose of giving suitable support and continuity of the projects and battles of the school and teacher review, at the end of 1884, just a few months away from the start of publication, the editor, Guido Antonio Marcati and the small group of writers and collaborators – Pietro Pasquali, Francesco Veniali, Carlo Tegon, Ettore Berni, Ildebrando Bencivenni and Guido Fabiani etc. – decided to set up a genuine publishing project, which took on the same name as the review¹⁹.

Having become a genuine specialist publishing hub, able to compete with the major Milanese publishers for schools, first and foremost Vallardi and Trevisini, the publishers, *Risveglio educativo* specialised in publishing text books for elementary and normal schools and publications to train and

¹⁷ See M. Grillandi, *Emilio Treves*, Turin, Utet, 1977, pp. 391-393.

¹⁸ S. Chillè, *Risveglio (Il) educativo*, in G. Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, La Scuola, 1997, pp. 548-549.

¹⁹ See *Risveglio educativo, casa editrice del*, in G. Chiosso (ed.), *TESEO. Tipografi e Editori Scolastico-Educativi dell'Ottocento*, Milan, Editrice Bibliografica, 2003, pp. 498-499.

upgrade teachers, inspired by positivist scientific pedagogy and modern didactic positions theorised in the columns of the publication²⁰.

As well as series of texts and manuals for school and teachers, the Milanese publishing group promoted a series of highly specialist periodicals (originally presented as simple supplements to the parent review «Il Risveglio educativo»), the function of which was to be to increase the reader base and to bring further impetus to projects, initiatives to renew school and education, supported by a group of teachers and people in education, working with the publishers. This was the case, as well as for some publications that were strictly scholastic and educational, such as «Il lavoro manuale» (1888-1891), originally edited by Carlo Tegon and then by Pietro Pasquali²¹, «La scuola del popolo» (1891-1898), edited by Giovanni Massa, «Il pensiero educativo» (1896-1898), edited by Ildebrando Bencivenni, and «La scuola secondaria italiana» (1897-1903), edited by Ottone Brentari²², also by the periodical of reading for children «Frugolino. Giornale dei fanciulli» (1886-1902)²³, also edited by Guido Antonio Marcati, who would be joined by co-editor, Milanese author Ester Bezzola Boni in 1887.

«Frugolino. Giornale dei fanciulli» was available as a joint preferential subscription to the readers of «Il Risveglio educativo». It came out on the «10th, 20th, and 30th of every month. In August and September, it was published on the 15th and the 30th» (it was only in 1888 that it became a weekly) and it consisted of 12-page issues printed in two columns, with drawings and illustrations in black and white. The price of subscriptions «from March to the end of September» was L. 2.50, while a single issue was L. 0.05.

Featuring a select group of collaborators, including teachers, school men, authors and children's writers (Ester Bezzola Boni, Luigia Corti, Guido Fabiani, Andrea Ferrari, Irma Landi, Alfredo Mendolia, Pietro Pasquali, Carolina Robbiani, Edvige Salvi, Virginia Staurengli Consiglio, Carlo Tegon, and Francesco Veniali), the Milanese publication included stories, novellas, poems, dialogues and plays, scientific articles, biographies of illustrious Italians and lively sketches of the geography and history of the country, aiming – coherently with proposals of pedagogical and didactic renewal, of a large group of teachers and educators, gathered around the review «Il Risveglio educativo» – not just to update the language and style of the literary texts designed to children, but

²⁰ See S. Chillè, *Editoria e scuola a Milano. Il caso del «Risveglio educativo»*, in G. Chiosso (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993, pp. 51-66.

²¹ See Id., *Lavoro (Il) manuale*, in G. Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992, pp. 251-252.

²² Id., *Scuola (La) secondaria italiana*, in Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, cit., pp. 404-406.

²³ From 1896, the subheading of the weekly was changed to: «Frugolino. Giornale illustrato dei fanciulli».

also to convey, through these texts, ethical orientation and educational models inspired by a secular, progressive concept of life and society.

It was not by chance that in November 1900, summing up the principles that had inspired the editorial line of «Frugolino. Giornale dei fanciulli», the chief editor, Andrea Ferrari, said:

Dear Readers, the *Frugolino* is all for you. It will show you what is happening in the world, in your country. It will show you what is living and urging the present; it will fill your soul with the vigorous breath of modernity, since from example, you can learn probity, faith in your own energies, and thus become exemplary citizens. In *Frugolino* you will not find stories with hollow morals, but real facts, taken from social life, of which you already are a part. *Frugolino* wants its readers to start now with getting to know and talk about important things around them; it wants them to prepare to enter society, not as inexperienced novices, but as members who are already aware of their rights and duties, ready to struggle for their existence²⁴.

In September 1896, Milanese publisher Giovanni Massa, which mainly dealt in the publication of school manuals and text books²⁵, purchased the publishing house *Risveglio educativo*, which, in the years immediately beforehand, had been forced to deal with a serious financial crisis and was no longer able to remain in business. Committed to cutting off the dead wood and to focusing available resources on that part of production – school books and text books for teachers – that would give greater guarantees of profit, the new owner gradually ceased publication of periodicals, considered, rightly or wrongly, as not profitable.

Of the titles founded by Guido Antonio Marcati and the group of teachers and school men working around «*Il Risveglio educativo*», the children's reading weekly «*Frugolino. Giornale dei fanciulli*» was the last to close in 1902, at the end of a long and outstanding season, during which Milan was truly the capital for periodicals dedicated to children and adolescents.

5. Publisher Edoardo Perino and the creation of a new hub for children's periodicals in Rome during the late 1800s

In the latter part of the 1880s, while moving sadly towards its end, the pioneering experience of the «*Giornale dei bambini*» (1881-1889) by Ferdinando Martini, Rome became the setting of a new and exciting flourishing of publications for children, as a result of the work and initiatives of Edoardo

²⁴ *Frugolino* [A. Ferrari], *Ai cari lettori*, «*Frugolino. Giornale illustrato pei fanciulli*», vol. 22, n. 5 (8 November), 1900, p. 60.

²⁵ *Massa Giovanni, editore*, in Chiosso (ed.), *TESEO. Tipografi e Editori Scolastico-Educativi dell'Ottocento*, cit., p. 352.

Perino (1845-1895), an enterprising printer from Turin, who, after working with some publishing companies in Florence, moved to the capital in 1870, where he founded a printworks that went on to become a genuine publishing house, able to print over a thousand books and 36 periodicals of different types, between 1876 and 1897²⁶.

Semi-illiterate and of an «outrageously vulgar nature», according to the severe judgement of his contemporaries²⁷, but with doubtless entrepreneurial skills and a notable nose for business, Perino, as effectively stressed by Rita Carrarini,

can rightfully join the ranks of those post-unification editors able to capture the ongoing changes in the market in good time and to direct their productions according to these changes. He compensated for the shortcomings of a cultural nature with his entrepreneurial skills and with a so-called does of “nose” with regard to the tastes of the public and the possibilities of economic success of his publishing initiatives. Like Milanese Edoardo Sonzogno, who he considered to be his antagonist, Perino focused on issues able to reach a popular public: series of Italian and international classics in economic editions, series of contemporary narratives and scientific, legal and historic series, illustrated reviews with current affairs and fashions, and literary and humorous journals. Moreover, compared to the production of Sonzogno, Perino also took an interest in a younger public, to whom he dedicated a narrative series “Biblioteca fantastica illustrata”, integrated by a few publications from outside this series, and seven illustrated journals, showing that he had understood, in the wake of the experiences of other publishers who had already successfully undertaken this path, that the increase in literacy opened up advantageous prospects for children’s publishers too²⁸.

We might add that, although there was no educational and cultural project, and dominated by an «excessive attention to profit», for the purpose of working efficiently and in the delicate and complex sector of children’s literature and periodicals, the Roman publisher was able to surround himself with a group of experts, consultants and collaborators, among whom we should mention, first and foremost, Onorato Roux (1859-1926), Epaminonda Provaglio (1851-1925) and Emma Perodi (1850-1918). Edoardo Perino did not just give them the task of selecting publications that were to be included in the leading series from the publisher, the «Biblioteca fantastica illustrata», which started in 1886 and was originally edited by Roux and then by Perodi, but also to edit and animate the different literary periodicals for children printed in the same period²⁹.

²⁶ See M.I. Palazzolo, S. Mori, G. Bacci, *Edoardo Perino. Un editore popolare nella Roma umbertina*, Milan, FrancoAngeli, 2012.

²⁷ See G. Bobbio, *Fra tipi e copie: variazioni su temi tipografici*, Rome, Tipografia del Senato, 1913, pp. 277-279.

²⁸ R. Carrarini, *Il paradiso dei bambini: libri e periodici per l’infanzia dell’editore Edoardo Perino*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, Milan, FrancoAngeli, 2004, p. 111.

²⁹ As we are reminded by Rita Carrarini: «Onorato Roux was therefore an authentic interpreter and, as curator of the *Biblioteca fantastica*, the inspirer of Perino’s editorial line in the field of children’s literature, but the same can be said of Epaminonda Provaglio, who succeeded Roux as

We refer first of all to the «Giornale illustrato per i Ragazzi», the first issue of which saw the light on 4 February 1886³⁰. Published on a weekly basis and featuring 8-page issues, printed in two columns with numerous illustrations, the periodical, with annual subscriptions costing 3 Liras and the single issue sold at 5 cents, was edited by Onorato Roux, school inspector and children's writer of a certain fame. Collaborators included scholars, authors and school men, such as: Antonio Bernabei, Ruggero Bonghi, Grazia Deledda, Rocco De Zerbi, Ugo Fleres, Fernando Fontana, Enrico Panzacchi, Matilde Serao and Enrichetta Tosi.

Attentive to the needs and interests of different age ranges, and persuaded that the content proposed in its columns should be inspired by the «golden principle» of «instructing and educating through enjoyment», the periodical printed by Perino aimed to implement a precise programme, by which it abided throughout the course of its publications:

The *Giornale illustrato per i Ragazzi* – it was said in an article entitled *Il nostro programma*, printed in the first issue of 4 February 1886 – will be a happy promise to younger Italian readers, a promise of lovely, good and useful things that will be carefully maintained, thanks to the active cooperation of our best writers. This journal will become the faithful echo of Italy's children, who will find the distraction they need after school in its pages, while reading the pleasant narration inspiring love for family and the easy reconfirmation of what they are taught at school while reading articles about history, science and art, advising love for study. The Editors will not save time or efforts in seeking the constant favour of younger readers³¹.

To this regard, alongside brand new stories, novellas, fairy tales, plays, and poems, there was a broad section dedicated to readers' letters, games and family pastimes. The «Giornale illustrato per i Ragazzi» published different articles on science, history, art and literature, as well as biographic profiles of the leading figures of the Risorgimento (G. Garibaldi, G. Mazzini etc.) and the main foreign writers of children's literature (J. Swift, R.H. Raspe etc.).

It is not clear why, two years after its first publication, with the issue of 5 January 1888, the «Giornale illustrato per i Ragazzi» changed its name, becoming «Il Paradiso dei Bambini. Giornale illustrato per i Ragazzi»³². The

editor of the *Paradiso dei Bambini*. [...] Provaglio's observations on the content and style of the work are useful to map out the editorial framework within which *Le novelle della nonna* by Emma Perodi, Perino's other great project to conquer a public of young readers» (Carrarini, *Il paradiso dei bambini: libri e periodici per l'infanzia dell'editore Edoardo Perino*, cit., pp. 116-117).

³⁰ With a lack of specific work dedicated to reviews for children and adolescents by Roman publisher, Edoardo Perino, we refer you, for an initial look at a synthetic but precise sheet: «Giornale illustrato per i Ragazzi», in S. Marini, A. Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, Florence, Franco Cesati Editore, 2001, pp. 35-37.

³¹ E. Perino, *Il nostro programma*, «Giornale illustrato per i Ragazzi», vol. 1, n. 1 (4 February), 1886, p. 2.

³² Il *Giornale illustrato per i Ragazzi* – it was said in the first issue of 1888 –, entering its third year, will try with all means to increasingly deserve the love and loyalty of families and the gratitude

new title, as well as continuing with the numbering of the previous one (the issue of 5 January 1888 was marked: year III), and there were no changes to the editorial setup and basic pedagogical and cultural approach, essentially inspired by the principle of «learning and education through enjoyment» («In the first days of July – said an article published in the issue of 8 June 1893 – your paper will be seven and a half years old, a time spent educating and instructing you and keeping you happy»³³). Even the editor was the same, Onorato Roux, who remained at the head of the weekly until the end of 1890. From January 1891, he was replaced by the children's writer and journalist, Epanimonda Provaglio, under the curious pen name of *Contessa Elda di Montedoro*³⁴.

«Il paradiso dei bambini» was destined to meet with a certain success, not just in Rome but all over Italy, above all under the editorship of Epanimonda Provaglio, and numerous, important collaborators and was published until the end of 1894³⁵. There were nine regular columns («La moda dei Bimbi», «Il Libro dei Perché», «Consigli Materni» etc.) and it also offered a wide range of «Fairy tales, Stories, Novellas, Short Stories, Anecdotes, Plays, Travel, and Historic, geographical and scientific articles» that made it one of the best known and most successful periodicals for children at the turn of the 20th century.

The worsening illness that would cause the early death of publisher Edoardo Perino was likely at the origin of the cessation of «Il paradiso dei bambini», which was followed, the next year, by a new weekly aimed more at adolescents than children and featuring a markedly educational style as well as the prevalent desire to support the work of teachers and schools and to integrate the knowledge acquired by readers in the classroom, through «choices and enjoyable instructive reading»: «La Ricreazione. Giornale per i Giovanetti» (1895-1897), also edited by Epanimonda Provaglio and compiled by the same collaborators who had brought success to the previous periodicals for children and adolescents, printed by the Roman publisher.

As well as a series of regular columns and a wide variety of novellas, poems, dialogues and serialised stories, «La Ricreazione. Giornale per i Giovanetti» stood out for the notable amount of room it dedicated to the narration of the

of its readers under the new name: *Il Paradiso dei Bambini. Il Paradiso dei Bambini*, thanks to its wealth of illustrations and good articles, will be the best and most instructive journal that children in Italy can read today (*Due paroline ai nostri Lettori*, «Il Paradiso dei Bambini», vol. 3, n. 1 (5 January), 1888, p. 7).

³³ *Cari Bambini*, «Il paradiso dei bambini», vol. 8, n. 3, 8 June (1893), p. 7.

³⁴ On this subject, please see «*Il Paradiso dei Bambini*». *Giornale illustrato per i Ragazzi*, in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., pp. 38-43.

³⁵ We limit ourselves to mentioning: Anna Vertua Gentile, Ida Baccini, Carlo Collodi, Edmondo De Amicis, Anton Giulio Barrili, Michele Lessona, Teresa De Gubernatis, Emma Perodi, Emilio De Marchi, Giulia Avolio, Clelia Bernini Attili, Enrico Fiorentino, Massimina Rosellini, Salvatore Raccuglia, Saverio Cantatore, Italo Ferretti, Salvatore Chiavetta, Michele Siniscalchi, Italo Scivas, Giuseppe Aurelio Costanzo, and Pasquale Ferrara.

Risorgimento and the biographies of the «Padri della Patria» and «Eroi del riscatto nazionale» [Fathers and heroes of the nation], and constant attention reserved, through a series of richly illustrated articles, subjects and questions on Italian language, literature, geography, sciences, art, music and gymnastics³⁶.

In 1889, just a little over a year after the transformation of the «Giornale illustrato per i Ragazzi» (1886-1887) into the longer-lasting, more successful «Il Paradiso dei Bambini» (1888-1894), Perino had created «Il Folletto dei Bambini», a periodical for children with a decidedly singular layout and editorial features³⁷, destined to be issued for just a few months and not a great success with young readers.

As the publisher himself noted in an article presenting the new publication, printed in «Il Rugantino» on 5 March 1889, «Il Folletto dei Bambini» was intended to represent a completely innovative proposal. In fact, as Perino said: «It is not a journal, or a collection or a fairy tale. It is a new thing, a species of large-format album [...] On its two inside pages, it contains a wonderful enterprise, a fun, happy, strange fairy tale»³⁸.

Published every two weeks («It comes out on Thursday and Sunday»), «Il Folletto dei Bambini» included 2 large-format pages with «a different story every time, told through a series of colour illustrations, set out in strips and accompanied by the relative captions». This introduced, for the first time, what was to become a publishing format that would be «very successful in children's publications»³⁹, over the coming decades, as can be seen, for example, in the famous «Corriere dei Piccoli», first printed in 1908 as a supplement to the «Corriere della Sera»⁴⁰.

In actual fact, although anticipating a print formula destined to meet with considerable success, «Il Folletto dei Bambini» did not meet with the hoped for popularity, and since it did not reach a sufficiently high number of subscriptions, it was withdrawn by the publisher⁴¹.

The other periodical for children and adolescents issued by all-round, enterprising Roman publisher Edoardo Perino was to have a different fate. We refer to «La Domenica dei Bambini. Giornale settimanale illustrato a colori», published from June 1890, as a Sunday supplement to «Il Paradiso dei Bambini. Giornale illustrato per i Ragazzi» (1888-1894) which became «Il

³⁶ See The sheet «*La Ricreazione. Giornale per i giovanetti*», in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., pp. 48-57.

³⁷ What was singular, among other things, was the fact that the cover of the fortnightly issue did not provide any news about the editor or the writers and collaborators.

³⁸ Quote taken from the sheet on «*Il Folletto dei Bambini*», in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., p. 58.

³⁹ Carrarini, *Il paradiso dei bambini: libri e periodici per l'infanzia dell'editore Edoardo Perino*, cit., pp. 119-120.

⁴⁰ See R. Lollo (ed.), *Il Corriere dei Piccoli in un secolo di riviste per ragazzi. Atti del Convegno (Università Cattolica del Sacro Cuore di Milano, 28 marzo 2008)*, Milan, Vita e Pensiero, 2009.

⁴¹ See the sheet mentioned for «*Il Folletto dei Bambini*», cit., pp. 58-64.

Tesoro dei Bambini. Giornale settimanale illustrato a colori» in January 1893, under the editorship first of Emma Perodi (until October 1896) and then of Erminia Bazzocchi (1848-1914). After the closure, in December 1894, of «Il Paradiso dei Bambini. Giornale illustrato per i Ragazzi», it was transformed into a supplement to «La Ricreazione. Giornale per i Giovanetti» (1895-1897).

The weekly entitled first «La Domenica dei Bambini» and then «Il Tesoro dei Bambini» would be published for seven years, between 1890 and 1897, with a different title and as a Sunday supplement to other periodicals for children and adolescents⁴². It stood out for its traditional yet high-profile nature and for the rich variety of “readings” offered to its young audience.

Compared to the «Paradiso dei Bambini» – as has been rightly mentioned – it has a heavier, more problematic appearance. It is brighter and has colour cartoons and plates, including full page, as well as a black and white last page to colour in or to act as an idea for a story in Italian. Even the content is more substantial: there is a collection of «prose and poetry», elements of geography, history, and science, mail, prize competitions and more. The habitual figurative subjects are based on children’s home and social life, with which readers can identify. A whole range of problems, linked to childhood or society in general, is highlighted through stories to raise awareness with the young reader or to prepare the future managing classes⁴³.

With such a solid, eye-catching publishing formula, with a rich use of iconography (illustrations, drawings, etc.) and a wide range of modern themes that were dealt with in the many stories on its pages (poverty, emigration, childhood abandonment, workers’ conditions, public education, social assistance etc.), it should be pointed out that on a par with other periodicals printed by Edoardo Perino, «La Domenica dei Bambini» and later, «Il Tesoro dei Bambini», stood out for its substantial closure with regard to progressive ideas, forcefully opposing a concept of society and development in a country inspired by the conservatism of Francesco Crispi and more specifically, to the rigidly elitist and classist ideology that was so much a part of the Italian middle classes at the end of the century⁴⁴.

In the light of the above, it is possible to fully understand how the famed programmed direction «to instruct the people as necessary, and educate them as much as is possible» put forward by the Minister for Public Education,

⁴² Both «La Domenica dei Bambini. Giornale settimanale illustrato a colori» (1890-1892) and the «Il Tesoro dei Bambini. Giornale settimanale illustrato a colori» (1893-1897) were weeklies, as already mentioned and had a format of 19x25 cm, over 8 pages with two columns, illustrated in colour and black and white. The main editors and collaborators included: Giulia Avolio, Erminia Bazzocchi, Cesare Carli, Odoacre Cianca, Forese, Ettore Giaquinto, Giulia Luini, Emma Perodi (also with the pen names: *La Direttrice* and *L’Amico dei Bambini*), Orestilla Piccardo-Biasci, Maria Prato, Salvatore Raccuglia, Massimina Rosellini and Riccardo Scotti.

⁴³ «Il Tesoro dei Bambini». *Giornale settimanale illustrato a colori*, in Marini, Raffaelli, *Riviste per l’infanzia fra ‘800 e ‘900 dai fondi della Biblioteca Alessandrina*, cit., pp. 44-47.

⁴⁴ See C. Duggan, *Creare la nazione. Vita di Francesco Crispi*, Roma-Bari, Laterza, 2000.

Guido Baccelli, the man behind the modern, nationalist revision of teaching programmes for elementary schools implemented by the fourth Crispi government with R.D. no. 525 of 29 November 1894⁴⁵, was vastly echoed in the story published in August 1896, entitled *Cortesia passata e scortesia presente*. This especially stigmatised the «false conviction» that it was necessary to take care of the people's education, rather than its morals and religion («It is true that today we take care of instruction and that education is put to one side because knowledge is thought to be more useful»)⁴⁶.

In the same way, the patent hostility to social betterment through education and schooling of girls and young women from the lower classes is not surprising and can be seen in the story *La donnina di casa*, published in March 1895: «All girls of modest status – complained the author –, all daughters of factory workers, doormen, all of them, have decided to study in order to become teachers. [...] Every day they become more estranged from their families, [...] and thus they neglect their true duties, which consist of helping their mothers, in learning housework and in being useful». By becoming the perfect «housewives»⁴⁷.

6. *Turn-of-the-century children's periodicals: from «Cenerentola, Giornale pei Fanciulli» (1892-1894) by Luigi Capuana, to «Novellino. Foglio illustrato a colori per bambini» (1899-1925) by Onorato Roux*

Turn-of-the-century Rome was one of the liveliest, modern hubs for printing children's periodicals, without which it would not have been possible to set down the conditions for the genuine revolution in the field that would be seen in the following century⁴⁸. This did not just depend on the extraordinary flourishing of journals and reviews «for younger readers» printed by enterprising publisher Edoardo Perino; it was also at the initiative of some writers and children's authors who, with the support of small printworks and publishers in the capital, tried to create publications destined, to use the words of Luigi Capuana, to enthuse «Italian children» of all statuses, and to «find a place in elegant salons, in moneyed households, and also in the humble abodes of factory workers and farmers»⁴⁹.

⁴⁵ See R.D. n. 525, 29 November 1894 – *Riforma dei programmi per le scuole elementari*, «Bollettino Ufficiale del Ministero della Pubblica Istruzione», 1894, pp. 1888-1916.

⁴⁶ Forese, *Cortesia passata e scortesia presente*, «Il Tesoro dei Bambini. Giornale settimanale illustrato a colori», vol. 4, n. 33 (16 August), 1896, pp. 257-258.

⁴⁷ Clara, *La donnina di casa*, «Il Tesoro dei Bambini. Giornale settimanale illustrato a colori», vol. 3, n. 12 (16 March), 1895, pp. 91-94.

⁴⁸ See P. Boero, C. De Luca, *La letteratura per l'infanzia*, Rome-Bari, Laterza, 1995, pp. 140-146.

⁴⁹ L. Capuana, *Editoriale*, in «Cenerentola. Giornale pei fanciulli», vol. 1, n. 1 (18 December), 1892, p. 1.

A prominent role in this field was taken by Sicilian author Luigi Capuana (1839-1915), who, after collaborating in previous decades with the most expert, widespread periodicals in this field, set up his own weekly entitled «Cenerentola. Giornale pei fanciulli» in 1892. It would be printed until 1894 and would leave its original mark on children's periodicals of the late 19th century.

It was originally published by Società Laziale Tipografica, and founded and edited by Capuana. It consisted of 30.5x22.5 12-page issues with black and white and colour illustrations. An annual subscription cost 5 liras, while a single issue was sold for 10 cents.

When outlining the programme behind «Cenerentola», Capuana did not forget to emphasise how «this new publication, which intended to be educational yet at the same time, fun and artistic, and with a straightforward Italian character», aimed to be ranked as a «children's journal on a par with the more beautiful and interesting publications in France, England and America». In particular, the new weekly was to be «attractive reading. A celebration for the eyes and intellect, where the content, far from boring the young readers, would add to their free time, taking them away from the laborious, boring tasks of school:

To all those children from the ages of 10 to 15, who are a little overwhelmed during the week by the sheer amount of homework and who – unfortunately – may not love certain books which give off an air of boredom and effort, *Cenerentola* intends to gather them round, outside, under the bright sun, and to have fun with them, to make them smile and distract them from any unhappy thoughts of school. This is apparent, as it is not said that all teaching needs to be dry and serious, and it has not been proven that school is able to teach and educate at the same time. *Cenerentola* is happy to take on this second task and for this it is aimed at the heart more often than at the intellect⁵⁰.

Educating young readers using «fantasy» and above all their «imagination», in the firm belief that «imagination is the best developed faculty of childhood, and that only in this way is it possible to try to change the nature of those who will be the stakeholders in the society of the future»; educating by focusing on the collaboration of a «group of valient artists of the pen, pencil and melody», called upon to provide joyful entertainment to young readers, issue by issue, week by week; educating through a rich «brand new» offer of «stories», «fairy tales», «whimsy», «plays for puppets», «dolls and drawings»: «*Entertain, and entertaining, educate*. This is the proposal that *Cenerentola* refuses to give up on any of its pages». This in short is the ambitious programme of a review for children and adolescents, which promised to «be so enjoyable that it would be awaited impatiently at the end of every week, and be met with joy and

⁵⁰ *Ibid.*, pp. 1-2.

celebration like a dear friend who comes to visit with their arms always full of gifts»⁵¹.

In fact, Capuana did things on a grand scale and did not spare any effort to make his «Cenerentola» a high-profile publication with original literary and educational ideas. First of all he called to his group of collaborators some of the biggest names in cultural journalism – from Marianna Almagià to Mario Bongialli, Giannina Brandimarte, Giuseppe Chiovenda, Ugo Fleres and Paola Lombroso Carrara, Enrico Nencioni, Gina Fantacchiotti, Renato Tanfani, Enrico Torrioli and Maria Vanni –, together with authors and writers of the calibre of Giovanni Verga and Luigi Pirandello.

As far as concerns the layout and internal division of the sections and columns, the weekly stood out for its fine, lively editorial style and choice to favour narrative texts and fantasy literature:

Fairy tales above all – as has been rightly pointed out – are given the message of Luigi Capuana, who in this period was collecting together the tales of his land. [...] It was the model of the fairy tale, offered with the usual detail, which gave «Cenerentola» its unmistakable appearance⁵².

As well as the fairy tales and the recovery of popular legends and traditional stories, to add to the offer of Capuana's weekly, we find columns on science, literary facts and various humanities, such as the one entitled «Spigolature del Mago». There was also a series of columns about the exciting tales and personages of the ruling Savoy house and the story of the nation, with specific reference to the epic events of the Risorgimento and the unification of Italy, in line with the need to promote patriotism and a national identity among the younger generations and within the lower classes, as conveyed by Crispi-style nationalism⁵³.

In actual fact, in spite of the high-profile planning and notable efforts of Luigi Capuana, mere months from the start of publication, «Cenerentola» began to suffer from a series of critical events: first and foremost were the notable printing and running costs of the weekly, which were not covered by the number of subscriptions. This led to the decision by the founder and editor to introduce a series of changes. Starting with the issue of 16 April 1893, «Cenerentola» was printed by a cheaper firm in Rome, the «cav. Enrico Voghera» and it underwent a significant series of changes. Although it kept to the original format, the number of pages was cut from 12 to 8 and overall, the new graphic style was made more modest, with fewer illustrations in each issue.

⁵¹ *Ibid.*, p. 2.

⁵² «Cenerentola. Giornale per fanciulli», in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., pp. 66-68.

⁵³ See U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Turin, Comitato di Torino dell'Istituto per la storia del Risorgimento italiano, 1992; and A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, Milan, Vita e Pensiero, 2004.

Although these changes were made, the financial situation of «Cenerentola» continued to remain uncertain, since the abovementioned critical issues persisted:

Probably – as rightly mentioned – everything was planned with too much levity. When a review needs to survive with so many problems [...] it needs to have the certainty of a fixed income. It was not thus for «Cenerentola». Capuana had hoped to attract many new readers but these were not enough to give the weekly the economic security that would guarantee its survival and therefore, the life of «Cenerentola» was a short one⁵⁴.

In the issue of 16 December 1894, the founder and editor announced the definitive closure of «Cenerentola», stating the following reasons to his young and unaware readers:

This, unfortunately, is not a strange, gloomy fantasy, dear readers of Cenerentola. The paper that you have loved will cease publication at the end of the year. It is likely that one day or another, Cenerentola will awaken from this sleep that looks like death. And then you will return to it, celebrating as you have over the last two years. [...] Cenerentola cannot die without thanking you, and without thanking all of the kind, expert collaborators who have affectionately and unselfishly helped it. And it is not a goodbye but an affectionate *au revoir!*⁵⁵

This picture of periodicals for children and adolescents published in Rome at the turn of the 20th century would not be complete if we forgot to mention two reviews with very different characteristics and fates. Both were printed by the small but very active Calzone & Villa publishers in via della Lungara, the popular street in Trastevere: «Il Messaggero dei Fanciulli», which was first issued on 1 January 1899, and «Il Novellino. Foglio illustrato a colori per Bambini», issued only a few days later, on the 5 January in the same year⁵⁶.

Edited with a managerial stance and great expertise by Emma Perodi, from its start, «Il Messaggero dei Fanciulli», which a few months later, in September 1899, took the new and more comprehensive title of «Messaggero della Gioventù», featured an ambitious project pursued by its editor: that of bringing back the past glory of the «mythical» and «unsurpassed» «Giornale per i bambini» (1881-1889) printed in the capital almost twenty years beforehand, by Ferdinando Martini. Perodi had been a tireless contributor to this journal,

⁵⁴ A. Carli, *Prima del Corriere dei Piccoli. Ferdinando Martini, Carlo Collodi, Emma Perodi e Luigi Capuana fra giornalismo per l'infanzia, racconto realistico e fiaba moderna*, Macerata, eum, 2007, p. 129.

⁵⁵ L. Capuana, *La morte di «Cenerentola»*, «Cenerentola. Giornale per i fanciulli», vol. 3, nn. 50-51 (16 December), 1894, pp. 783-784.

⁵⁶ There are synthetic but precise sheets for both periodicals – entitled «*Il Messaggero dei Fanciulli*» and «*Novellino*». *Foglio di fiabe e novelle illustrate a colori* – published in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., respectively on pp. 79-81 and pp. 82-85.

going on to become the editor when she took the place of Carlo Collodi, from December 1887 through to its forced closure in June 1889.

To this regard, illustrating to the young readers of «Il Messaggero dei Fanciulli» the programme of the new publication, Emma Perodi did not fail to emphasise how the sudden and in many ways unexpected cessation of the publication founded by Ferdinando Martini had and continued to cause her deep hurt («When it had existed for several years, was alive and loved, surrounded by fondness, it died but not a natural death... it was killed! [...] The *Giornale per i Bambini* died in one stroke... of a pen! It was sentenced to death!»); and how, in the years that followed, she had continued to promise herself that she would create a periodical for children and adolescents that would have the same layout and intentions as the journal left to die unexpectedly a decade or so before:

I was never able to console myself, never. And I continued always to dream of founding another publication that would be identical, that would be loved by the generation growing up now like the publication before was loved by the generation that is now adult. [...] I never gave up hope and now, I have succeeded in my intention⁵⁷.

In fact, the periodical edited by the Tuscan author was only very vaguely based on the «*Giornale per i bambini*» by Ferdinando Martini. Its model was in fact the famous, successful «*Journal de la Jeunesse. Nouveau Recueil Hebdomadaire Illustré*» (1873-1914) published in Paris by Hachette⁵⁸, from which it took not only the publication interval, format, and page layout⁵⁹, but also the choice to entertain young readers with a series of «curious columns» and «fun, thrilling reads»: «novellas, scenes in verse, delicate poems, scientific articles, fairy tales, variety, pages to educate your heart and open your mind, to put you in good spirits»⁶⁰.

The more assiduous collaborators of «Il Messaggero dei Fanciulli», which went on to become the «*Messaggero della Gioventù*», included Carlo Anfosso, *Jack La Bolina* (pen name of Augusto Vittorio Vecchi), Gian Leopoldo Piccardi, Riccardo Pierantoni, Ida Tedeschi, and Fanny Vanzi Mussini.

Emma Perodi's weekly stood out immediately for its modern publishing format and for the rich variety of its content:

⁵⁷ E. Perodi, *Cari fanciulli*, in «Il Messaggero dei Fanciulli», vol. 1, n. 1 (1 January), 1899, pp. 1-2.

⁵⁸ See Ch. Thirion, *La presse pour les jeunes de 1815 à 1848*, «Bulletin des Bibliothèques de France», vol. 17, n. 3, 1972, pp. 111-132.

⁵⁹ On a par with «*Journal de la Jeunesse. Nouveau Recueil Hebdomadaire Illustré*», «Il Messaggero dei Fanciulli», which went on to become «*Messaggero della Gioventù*» was issued weekly in an 8-page, 21x29 cm format with two columns and illustrations in black and white.

⁶⁰ Perodi, *Cari fanciulli*, cit., p. 2.

There is a rich, compelling offer – as rightly pointed out – that aims to educate and inform with joy, which means by using illustrations, curious articles, and puzzles. Educational themes are at the forefront, but special care has also been dedicated to scientific information.

What was also notable was the «intention to teach, feeding children's natural curiosity»⁶¹; while the growing focus on texts about ethic and civic education and the promotion of civic values among young people, also turned out to be incredibly important.

In spite of the doubtless good qualities, «Il Messaggero dei Fanciulli», which went on to become the «Messaggero della Gioventù», was unable to establish itself in the difficult market of periodicals for children and adolescents, and to acquire a significant number of subscriptions to cover the high printing and running costs. So much so that, after a promising start, at the end of the first year, it was forced to cease publication definitively.

The aspirations of Emma Perodi's weekly were thwarted by the cut-throat competition of another periodical being produced by the same Roman publisher, Calzone & Villa also at the start of January 1899. We refer to «Il Novellino. Foglio illustrato a colori per Bambini», placed in the skilled hands of the already mentioned Onorato Roux, old collaborator of Roman publisher Edoardo Perino, for whom he had edited different reviews and specialist publications in the 1880s.

Published weekly in a 20x29.5 cm format of 8 pages in two columns, «Il Novellino» could count on a rich group of top flight collaborators from literary circles, as well as famous writers – from Ida Baccini to Grazia Deledda, Maria Cavanna Viani Visconti, Gualberta Alaide Beccari and Anna Franchi, Franco Ballerini, Luigi Grande and Camillo Marini – together with a large group of emerging young talents who would go on to become famous, as is the case of *Yambo* (pen name of Enrico Novelli) and Giuseppe Ernesto Nuccio, to name the two most representative.

Destined to continue with its publishing parable almost completely during the 1900s⁶², and to make it as far as 1925, this long-lasting journal edited by Onorato Roux, featured – at least in its initial stages, which are the only ones of importance to us here – specific attention to smaller children (between 6 and 10 years of age), proposing fairy tales, comedies, novellas, and short stories with a fairy tale narrative as well as other texts especially devised «for younger readers» and richly illustrated in colour.

The choice to focus almost exclusively on fantastic narrative and to give a good deal of space to colour illustrations and comic strips contributed to the immediate and growing success of «Il Novellino», as can be seen, among other

⁶¹ «Il Messaggero dei Fanciulli», in Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., p. 81.

⁶² See «Novellino». *Foglio di fiabe e novelle illustrate a colori*, in S. Marini, A. Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., pp. 82-85.

things, in the many letters of praise and encouragement sent by young readers and published in the popular column «La Posta dei Bambini»:

Dear Novellino – wrote young reader Maria Barbera –, I have bought you for a whole year now and you cannot imagine how much fun I have had reading your lovely fairy tails, your best stories and your magnificent cartoons. Even my little brother Giulio has had a lot of fun⁶³.

The young Maria Barbera was echoed by another child, Renato Ronzani, who also wanted to express his appreciation for a periodical that was able to hit the mark and truly enthuse its readers:

Dear Novellino, a very dear aunt who lives in Rome has sent me your paper many times, and reading your lovely tales and observing the drawings have made me want to subscribe. You will not believe how many sacrifices I had to make to save up the amount I needed: I gave up cakes and sweets, fruit, toys... and I finally succeeded. Now I am really happy and I can't wait for Thursdays so that I can read you. [...] I was 8 last month and I go to the 4th year at elementary school. I salute you with much affection⁶⁴.

7. *Children's printed periodicals in a period of transition: the difficult wager of the «Giornale dei Bambini» (1895-1906) by Ida Baccini*

In 1904, looking at the most important events in her life, in that golden book of autobiographical memoirs, already mentioned here and entitled *La mia vita*, Ida Baccini described the basic reasons that led her to become the editor of the «Giornale dei Bambini» in 1895. She had already been responsible for the challenging editorship of the weekly for young Italian girls, «Cordelia» (1881-1942), founded some time before by Angelo De Gubernatis for a decade, and at the same time, she provided a series of important information about the difficulties encountered by this periodical during its relatively long but anything but easy existence:

A perfect «children's paper» – she wrote – had appeared in my imagination, more complete, more harmonious, with all of its divisions and columns, and as is always the case when an idea pursues me, it would not leave me in peace until the publisher of *Cordelia* [Licinio Cappelli from Rocca S. Casciano] was persuaded to produce a children's journal. I only realised the serious error after the early stages and that is, that there are very few children's writers in Italy and those few are more novelists than journalists. It is not possible to fill pages of a periodical with fairy tales and novellas; there needs to be articles. And since

⁶³ The letter is dated: Minervino Murge, 9 January 1900 («La Posta dei Bambini»), «Il Novellino. Foglio illustrato a colori per Bambini», vol. 2, n. 4 (25 January), 1900, p. II.

⁶⁴ The letter is dated: Vergato, 15 January 1900 («La Posta dei Bambini»), *ibid.*, p. IV.

«children's journalism» is terribly difficult, for the first few years, I was forced to contribute my own articles. My «Giornale dei bambini» came out in 1895 and it is still here, and although its life is not glorious, at least it is peaceful, and yet it is still very far from the ideal of beauty that I dreamed of⁶⁵.

Published by Licinio Cappelli in Rocca S. Casciano, the «Giornale dei Bambini» came out every week (Thursday) and its large issues, each 12 pages with black and white and colour illustrations, initially contained stories, novellas, plays, poetry and dialogues, as well as a series of columns on games and pastimes, and a rich section – entitled «In salotto» – dedicated to the letters from the young readers to their editor.

In the first few years it was written almost totally by Ida Baccini (using various pen names: *La mamma*, *Ida*, *La Fata Morgana* etc.), in 1902 there new collaborators came along, including: Silvia Albertoni, Guido Biagi, Bianca Maria Cammarano, Guido Carocci, Domenico Coleschi, Giuseppe Conti, Rosa Gaccaria Barberis, Marianna Giarrè Billi, Guido Mazzoni, Grazia Pierantoni Mancini, Lina Schwarz, and Emma Valle.

That same year, the «Giornale dei Bambini» inaugurated a series of regular columns that would arouse a good deal of reader interest. This is the case, for example of «Il Notiziario dei Bambini», which contained the main news from national papers concerning the world of childhood and adolescence. The same is true of «Il Corrierino Scientifico», the column that aimed to make the study of natural sciences «simple and fun». We should also point out the column, «Il Novelliere dei Bambini», with its wide collection of foreign novellas translated into Italian.

In January 1904, probably following a significant drop in subscriptions, Ida Baccini's weekly was resized, passing from a large format to a smaller one and from 12 to 8 pages per issue.

In the two years that followed, there were ups and downs for the «Giornale dei Bambini» which never managed to establish itself definitively or rather, to achieve the minimum number of subscriptions that would have allowed it to keep away from the risk of closure. This, very probably, was due to the very attentive but decidedly traditional layout given to the publication by its editor who, like the publisher, was convinced that the secret of an «excellent publication» for children and adolescents, was to inform them «with the healthy practical criterion of education by which it is only possible to achieve the hoped for aim of training the hearts and minds of children of both sexes»⁶⁶.

In actual fact, the times had already changed irreversibly, as had the mood, expectations and literary tastes of the children and adolescents in the early years

⁶⁵ Baccini, *La mia vita. Ricordi autobiografici*, cit., p. 251.

⁶⁶ We refer to the advertising page, signed «L. Cappelli», addressing teachers and dated «Rocca S. Casciano, 4 January 1899», published in the appendix of the first issue of the «Giornale dei fanciulli».

of the 20th century, compared to their peers of 20, 15 or even just 10 years before. On this subject, in the early months of 1906, Ida Baccini authorised publisher Cappelli to start the paperwork to merge her «Giornale dei Bambini» into the emerging «Il Giornalino della Domenica» (1906-1911; then 1913-1920). This was an innovative, highly original weekly for children and adolescents, edited by journalist and author Luigi Bertelli (1858-1920) – better known under the pen name *Vamba* – and published in Florence by Bemporad. The first issue of the journal went on sale on 24 June 1906⁶⁷.

Destined to be an immediate and enormous success, as shown by its average circulation, which in the initial years was 30 thousand copies per issue, «Il Giornalino della Domenica» edited by *Vamba* represented something more than a significant and innovative periodical for children and adolescents. Through the expert direction of the editor and his closest collaborators, in fact, the publication offered readers more than just amusement; it also provided knowledge and information as well as news from the «world of adults» that could stimulate its readers' independent viewpoints and take them in the direction of a new awareness of the needs of society and the principles behind government and the progress of the civic-minded community.

Unlike the many periodicals that had been founded in Italy during the 19th century, it also became a point of reference and major means to link a series of initiatives that would mobilise Italian youth – at least in the middle and upper classes and the urban bourgeoisie – marking an actual break with the lively and varied texts for young people and children that had been a characteristic of the peninsula during the whole of the previous century.

⁶⁷ See A. Ascenzi, «Educating the youth of the new Italy». *Luigi Bertelli/Vamba between the inheritance of the Risorgimento and the construction of a new ethical civil conscience*, in Ead., *Education and the metamorphoses of citizenship in contemporary Italy*, Macerata, eum, 2009, pp. 123-159.

«From the bricks to the memory tree»: interlocutions between school architecture and historical-educational heritage. Porto Alegre/RS (1919-2016)*

Tatiane de Freitas Ermel
Department of Human Studies
Regional Integrated
University of Upper Uruguai and
Missions (URI)
Frederico Westphalen (Brasil)
termel@uri.edu.br

ABSTRACT: The study falls within the perspective of Cultural History and School Culture, problematizing school architecture as historical-educational heritage. It investigates the first buildings constructed in the period of First Brazilian Republic, in which discourses concerning the need to build adequate school spaces for children were lined up with the ideal of quantitative and qualitative improvement of primary education. It analyzes a documentary corpus composed of Reports by the Direction of Public Instruction and Public Works of the State of Rio Grande do Sul, as well as photographs, floor plans, projects and documents from school archives. The research shows that the school building is a material support for school culture conservation, and relates it to preservation and conservation policies.

EET/TEE KEYWORDS: Primary school; School architecture; Historical-educational heritage; Brasil; XXth Century.

Introduction

The material traces of educational institutions have instigated many researchers interested in the importance of school architecture as an active

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element of educational processes. In this perspective, we consider that the valuation of school material culture, especially stimulated by school culture studies, had widened horizons beyond its functionality, interrogating its meanings and symbolic representations. One of the basic elements for the constitution of school culture consists in a specific space, which, along with the courses categorized in levels and a professional body, forms the triad that would be essential for researches in this area¹.

Bringing closer educative issues and the theory of *threefold present*², we understand school spaces through its *past*, as a memory of education; through its *present*, by observing its current situation; and through its *future*, by glimpsing a scenario of expectations on its valuation and preservation. For that matter, the main objective of this study consists in relating the architecture of the first primary school buildings, built by the Government of the State of Rio Grande do Sul, with historical-educational heritages, taking cultural elements into consideration and understanding them as material and immaterial properties of education.

In the context of instauration of the First Brazilian Republic (1889), primary schools were related to the need of formation of a new nation, in a new society, with a new citizen, and new people. The monarchic past, categorized by republican governors as obsolete, unhealthy and ignorant, would have to be surpassed by progress, hygiene and scientific knowledge. The second half of the 19th century was marked by events that threw into crisis a model which existed since the Proclamation of Brazilian Independence, in 1822. The end slave trade (1850), and, later, the abolition of slavery (1888); the organization of republican parties, since 1870, in different Brazilian States; the Saraiva Law (1881)³; the crisis between National State and Catholic Church; as well as the arrival of European immigrants points to the opening of new horizons.

The analysis of the public primary schools scenario in the First Brazilian Republic is based on the process of organization of an educational network, promoted by state governments. Graded schools, which demanded new pedagogical and space requirements, became a new model of primary education; they were countrywide known as “school groups”. In this context, the State of São Paulo became a pioneer, in 1893, serving as model for other regions of the country⁴.

¹ D. Julia, *A Cultura Escolar como objeto histórico*, «Revista Brasileira de História da Educação», n. 1, 2001, pp. 9-43.

² P. Ricoeur, *A memória, a história, o esquecimento*, translated by A. François *et al.*, Campinas, Unicamp, 2007, p. 112.

³ Saraiva Law, n. 3.029 of January 9th, 1881, after a series of quarrels, keeps illiterates excluded from the electoral process, emphasizing that illiteracy was one of the main national problems at the time.

⁴ The establishment of these institutions occurred in the following years: Rio de Janeiro (1897); Maranhão (1903); Minas Gerais (1906); Rio Grande do Norte and Espírito Santo (1908); Mato Grosso (1910); Piauí (1910); Sergipe (1911); Bahia (1913); Acre (1915) and Goiás (1918). J.C.

Proposing an articulation among the first buildings designed for primary schools in the State of Rio Grande do Sul, the first part of this paper discusses the relations between school architecture and historical-educational heritage, considering the importance of school buildings as material support for school culture conservation. After this topic, by means of exploring Reports by the Direction of Public Instruction and Public Works of the State of Rio Grande do Sul, as well as visual sources, such as floor plans, projects and photographs from the Department of Public Works' Map Collection, we problematize two cases of buildings constructed in the city of Porto Alegre, within the first decades of the 20th century. In addition, we analyze aspects concerning the trajectory of these constructions, emphasizing their current situation. On this matter, we identify, on the one hand, the lack of public policies of conservation and preservation of this type of building and, on the other hand, the school communities' attempts to safeguard vestiges of their history and memory.

1. Interlocutions between school architecture and historical-educational heritage

Research on spaces and school architecture have been constantly and internationally discussed; this was the theme of the Spanish Society for the Historical-Educational Heritage Study (SEPHE) Meeting, in June-July, 2016, which took place in Donostia-San Sebastián/Spain⁵. Spanish authors, such as

Araújo, S. Souza, *A Escola primária em Minas Gerais e no Triângulo Mineiro (1891-1930)*, in J.-C. Araújo, B. Ribeiro, S. Souza (edd.), *Grupos escolares na modernidade mineira. Triângulo e Alto da Paranaíba*, Campinas, Alínea Editora, 2012, p. 24. In addition, it is possible to mention, in Brazil's Southern region, the states of Paraná (1903) and Santa Catarina (1910). Concerning primary schools in Rio Grande do Sul, we can point out that it had distinct organization characteristics if compared to the ones built in other Brazilian States, especially with respect to the nomenclature used; the elementary schools were the primary education model in this state. The school groups, created from 1915 onwards, were considered institutions of lesser prestige – which did not limit their growth in the last decade of the First Republic, until they numerically superseded the elementary schools.

⁵ Original name in Spanish: Espacios y Patrimonio Histórico-Educativo. VII Jornadas Científicas de la SEPHE y V Simposio Iberoamericano Historia, Educación, Patrimonio Educativo (Donostia-San Sebastián, Spain). More recently, there was a session of oral presentations at ISCHE's last meeting, in Buenos Aires, Argentina (2017), with six studies on school architecture in different countries: Argentina, Brazil, Costa Rica, Mexico and Switzerland.

Jaume Trilla⁶, Antonio Viñao Frago⁷ and Agustín Escolano⁸, have contributed, since the 1980s, for reflections in this area, presenting and discussing the concept of space and school architecture in Southern Europe and establishing fruitful dialogues with Latin America⁹.

⁶ J. Trilla, *Ensayos sobre la escuela. El espacio social y material de la escuela*, Barcelona, Ediciones Laertes, 1999.

⁷ From this author's work, we highlight the following publications: *El espacio escolar: introducción*, «Revista Historia de la Educación», vol. 4, nn. 12-13, 1993-94, pp. 11-16; *Espacio, Tiempo, Educación y Historia*, Morelia, IMCED, 1996; *Do espaço escolar e da escola como lugar: propostas e questões*, in A. Viñao, A. Escolano, *Currículo, espaço subjetividade: a arquitetura como programa*, Rio de Janeiro, DP&A, 1998; *Sistemas Educativos, culturas escolares y reformas. Razones y propuestas educativas*, Madrid, Ediciones Morata, 2002; *Espaços, Usos e Funções: a localização e disposição física da direção escolar na escola graduada*, in M. Bencostta (ed.), *História da Educação, Arquitetura e Espaço Escolar*, São Paulo, Cortez, 2005, pp. 15-47; *Escolarización, edificios y espacios escolares*, «Revista CCE. Participación Educativa», n. 7, 2008, pp. 16-27.

⁸ From this author's work, we highlight the following publications: *La arquitetura como programa: espacio-escuela y curriculum*, «Revista Historia de la Educación», nn. 12-13, 1993-94, p. 97-120. *Arquitetura como Programa. Espaço-Escola e Currículo*, in A. Viñao, A. Escolano, *Currículo, espaço subjetividade: a arquitetura como programa*, translated by Veiga Neto, Rio de Janeiro, DP&A, 1998; *Tiempos y espacios para la escuela. Ensaio Historicos*, Madrid, Biblioteca Nueva, 2000; *The School in the city. Architecture as discourse and text*, «Paedagogica Historica», vol. 39, nn. 1-2, 2003, pp. 55-64.

⁹ Concerning this subject, there are significant studies in different countries. The following publications analyze cases in France, England, Germany, United States and Switzerland: A.M. Châtelet, *Les Écoles primaires à Paris, 1870-1914: définition et élaboration d'un équipement*, Thèse d'histoire de l'art sous la dir. de François Loyer. 3 vols, Université de Strasbourg II, 1991. Published as *La Naissance de l'architecture scolaire. Les écoles élémentaires parisiennes de 1870 à 1914*, Paris, Honoré Champion, 1999. A.M. Châtelet et al. (edd.), *L'école de plein air. Une expérience pédagogique et architecturale dans l'Europe du XX siècle*, Paris, E. Recherches, 2003; Id., *Ensaio de Historiografia I: a arquitetura das escolas no Século XX*, translated by M. Bencostta, «Revista História da Educação», n. 20, 2006, pp. 7-38. Publications analyzing cases in Portugal: C. Manique, *Escolas belas ou espaços são? Uma análise histórica sobre arquitetura escolar portuguesa (1860-1920)*, Lisboa, Instituto de Inovação Educacional 2002; C. Manique, *O estudo dos espaços escolares: balanço da investigação científica portuguesa (2005-2014)*, in L.A. Alves, J. Pintassilgo (edd.), *História da Educação fundamentos teóricos e metodologias de pesquisa: balanço da investigação portuguesa (2004-2015)*, Porto, Centro de Investigação Transdisciplinar, Cultura Espaço e Memória, 2015, pp. 131-147; M. Felgueiras, *Cenografias de escolarização: Os edifícios escolares da ditadura*, «Contributos, Estudos do Século XX», n. 6, 2006, pp. 153-172; Id., *A arquitetura da escola primária em Portugal nos séculos XIX e XX*, in J. Fernández, G. Tocino, M. Miranda (edd.), *La Escuela y sus Escenarios. Actas de los IX Encuentros de Primavera en El Puerto*, El Puerto de Santa María, Concejalía de Cultura e Ayuntamiento de El Puerto de Santa María, 2007, pp. 37-65. Ead., *Schools buildings as a context to understand our common past*, in M. Felgueiras, A.G. Blacksmith (edd.), *Buildings Telling European Heritage*, Coimbra, Centro de Estudos Interdisciplinares do Século XX, 2008, pp. 157-162. M. Felgueiras, O. Graça (edd.), *Escolas Conde de Ferreira. Marco Histórico da Instrução Pública em Portugal*, Portugal, Sesimbra, 2009. Analyzing historically the transformation of school spaces in Western Europe, from the end of 20th century onwards: C. Burke, I. Grosvenor (edd.), *School*, London, Reaktion Books Ltd., 2008. On cultural history of classrooms, by researchers from different countries: S. Braster; I. Grosvenor; M. del Mar del Pozo Andrés (edd.), *The Black Box of Schooling. A Cultural History of the Classroom*, Brussels, Peter Lang, 2011. Publications analyzing cases in Italy: P. Fossati. *L'edilizia per le scuole del popolo nell'Ottocento genovese*, «History of Education & Children's

The attention paid to the space dimension of human activities, especially considering historical and anthropological aspects, became necessary to the study of school spaces, taking different perspectives into account. This area takes into consideration political and educational history, more specifically, studies concerning the interventions and regulations provided by States and public organisms, as well as official models, school constructions' policies and the establishment of educational nets. Within the perspective of social history, these studies highlight the hygienist-medical discourse in the educational field, in the context of space configuration, and its distribution and uses in accordance with, for example, social class or gender¹⁰.

We consider that the child's entrance in the school marks a fundamental moment of transformation; this ritual can only be seen that way with the existence of a specific school space¹¹. For Jaume Trilla, the passage from child to student implies a specific status for school members; the permanence in a determined space and for a certain time¹² transforms a child into a student. For that matter, childhood becomes to occupy, basically, two spaces, and to have two social distinct functions: at home and at school, respectively. This new social configuration and space organization, in which the child leaves the family space and goes to school, significantly modifies the existence of human beings¹³.

Considering questions proposed in studies of school spaces and architecture, we seek interlocution with historical-educational heritages, understanding that schools are a significant part of the material and immaterial culture of different societies; therefore an analysis of these spaces can be based on universal trends, as well as on their particularities. In this perspective, by considering cultural heritage postulates, we attribute values to school buildings, considering their distinct forms and levels.

Literature», vol. 9, n. 2, 2014, pp. 445-466. In Brazil, we can highlight the following works: L. Faria Filho, D. Vidal, *Os tempos e os espaços no processo de institucionalização da escola primária no Brasil*, «Revista Brasileira de Educação», n. 14, 2000, pp. 19-34. H. Moussatche, T. Mazzoti, *Arquitetura Escolar: imagens e representações* «Revista Brasileira de Estudos Pedagógicos», vol. 81, n. 198, 2000, pp. 229-315. F. Baltar, *Arquitetura de escolas no século 19: primeiras escolas construídas no Brasil*, «História da Educação», vol. 5, n. 10, 2001, pp. 53-84; M. Bencostta (ed.), *História da Educação, Arquitetura e Espaço Escolar*, São Paulo, Cortez, 2005; S. Wolff, *Escolas para a República: os primeiros passos da Arquitetura das escolas públicas paulistas*, São Paulo, EDUSP, 2010.

¹⁰ Viñao, *Do espaço escolar e da escola como lugar: propostas e questões*, cit. pp. 12-13.

¹¹ S. Gvirtz, G. Augustowsky, *Imágenes de nuestra escuela. Argentina 1900-1960*, Buenos Aires, Santillana, 2002.

¹² Trilla, *Ensayos sobre la escuela. El espacio social y material de la escuela*, cit.

¹³ In his renowned work, Philippe Ariès presents, as one of his main theses, the construction of the feeling of childhood and family, which, generally, is still shared in the West, and was established in the passage from Middle Age to Modern Age, culminating with the industrial society and European bourgeoisie model. In this context, the role of schooling was fundamental for the configuration of new forms of being a child and of living together with the family. On this subject, see: P. Ariès, *A invenção da criança e da família*, translated by Dora Flaksman, 2. ed., Rio de Janeiro, LTC, 2012.

In order to understand issues concerning historical-educational heritage, we must consider the concept of heritage in a broad sense. Despite variations in different countries, the notion of heritage was related to the construction of nationalities - in a first moment, it concerned nations' monuments and material property; afterwards, it started to encompass cultural aspects and exceed national borders¹⁴. In France,

the invention of conservation of historical monuments, with its legal and technical apparatus, mostly attributed to the monarchy of July, was anticipated by revolutionary instances: their decrees, and 'instructions' prefigured, in both form and substance, the approach and the procedures developed in the decade of 1830 by Vitet, Mérimée and by the first Historical Monuments Commission¹⁵.

The history of objects and the construction of memory places are intertwined with the values attributed in each historical period, and may have a sense of heritage. The materiality that survives time constitutes different forms of thinking the culture of individuals, groups, communities, society and nations. The notion of heritage is strictly related to the idea of the modern National States construction - an invention from the 18th century, more specifically, from the ideological movements of the French Revolution, which spread throughout the West.

From the initial prerogative concerning historical monument restoration, centering its attention only on the preservation of great monuments, it changed its direction towards an urban manifestation, an awareness that aimed at the preservation of heritage as an urban project¹⁶. In 1972, another important movement concerning the notion of heritage arose in the general Conference of UNESCO, through the *Convention for the Protection of the World Cultural and Natural Heritage*. Throughout the 20th century, heritage issues took different dimensions, for example, concerning space. From a discussion more restricted to European context in the decade of 1930, the notion of heritage was expanded to other continents, involving 80 countries in the year of 1979¹⁷. The extension

¹⁴ When the historian François Guizot (1787-1874) was nominated Minister of the Interior of France, in 1830, he created, by statute, the position of Historical Monument Inspector. Successively, the following citizens held this position: Ludovic Vitet, historian and critic of art; Prosper Mérimée, writer; Viollet le Duc, architect. M. Chuva, *Arquitetos da memória: sociogênese das práticas de preservação do patrimônio cultural no Brasil (anos 1930-1940)*, Rio de Janeiro, UFRJ, 2009. p. 51. In the same decade, the first Historical Monuments Commission was also created, in 1837, constituting three great historical monument categories: Classical Antiquity remaining structures; religious buildings from the Middle Ages and some castles. In 1887, the Superior Historical Monument Commission was created, with the objective of evaluating the existing restoration demands, as well as examining the security conditions of the French national heritage. F. Choay, *Alegoria do Patrimônio*, translated by Luciano Vieira Machado, São Paulo, Estação Liberdade, UNESP, 2001.

¹⁵ Choay, *Alegoria do Patrimônio*, cit. p. 95.

¹⁶ F. Hartog, *Tempo e Patrimônio*, «Varia Historia», vol. 22, n. 36, 2006, pp. 261-273.

¹⁷ The first International Conference for Historical Monument Conservation was in 1931, in

of heritage goods – typological, chronological and geographic – preceded the growth of its public¹⁸.

In Brazil, initiatives around national heritage conservation were inspired by the French model of state intervention, with the creation of the National Service for Historic and Artistic Heritage (SPHAN)¹⁹, in 1937, and with the Decree-Law no. 25, of November 30th, 1937, which regulates the protection of cultural goods (mobile and immovable). The notion of heritage, as a legal category, was timidly mentioned in the 1934 Constitution, on its 10th article, which assigns to the Union and the States the protection of natural goods, monuments of artistic and historical value, as well as the prevention of evasion of works of art²⁰.

The creation of SPHAN was strictly related to the project of national unit and the construction of a national heritage conception. This event can be designated as the «origin and consecration of the notion of national heritage in Brazil, considering, among other aspects, that SPHAN, from 1937 to 1946, legally protected more than 40% of all heritages under preservation until the beginning of the 21st century»²¹.

SPHAN, which was connected to the Ministry of Culture, in 1946, was renamed to Department of National, Historical and Artistic Heritage (Dphan), and, in 1970, its name was changed to the current one: Institute of National Historical and Artistic Heritage (IPHAN). Throughout the political trajectory of heritage preservation in Brazil, this department, linked to the Federal Government, incorporated the anthropological concept of culture, problematizing the notions of heritage, preservation and protection. It began to consider the perspective of cultural goods – both material and immaterial – and became responsible for «preserving, disseminating and supervising Brazilian cultural goods, as well as assuring the permanence and usufruct of these goods for both current and future generations»²².

Revisiting heritage preservation initiatives in Brazil, we observe that the Decree-law no. 25, from 1937, which instituted the procedure of listing landmarks to be

Athens, with the participation of European countries. In 1964, in Venice, the event included the participation of non-European countries: Tunisia, Mexico and Peru.

¹⁸ Choay, *Alegoria do Patrimônio*, cit.

¹⁹ A study highlights the participation of Mário de Andrade in the organization of the national heritage before the creation of Sphan, with a preliminary draft of Span (Service for the National Artistic Heritage), as well as the discussions concerning the necessity to place in a higher level the work of selection of collections in Brazilian museums. It also underlines the participation of Mário de Andrade as a Sphan permanent consultant. M.B. Bomeny, *O patrimônio de Mário de Andrade*, in M. Chuva, *A invenção do patrimônio: continuidade e ruptura na constituição de uma política oficial de preservação no Brasil*, Rio de Janeiro, Ministério da Cultura, IPHAN, 1995, pp. 11-26.

²⁰ M.C. Fonseca, *Patrimônio em processo. Trajetória da política federal de preservação no Brasil*, Rio de Janeiro, UFRJ, Ministério da Cultura, IPHAN, 2005, pp. 37-38.

²¹ Chuva, *Arquitetos da memória: sociogênese das práticas de preservação do patrimônio cultural no Brasil (anos 1930-1940)*, cit., p. 31.

²² Institute of National Historical and Artistic Heritage website. Available at: <<http://portal.iphan.gov.br/>> (last access: 30.09.2017).

protected, was «the first legislative materialization of the constitutional principle of properties' social function, which had previously been recognized by the 1934 Constitution»²³. After the 1988 Constitution, «new concepts proposed distinct ways of thinking relations among preservation policies of collective memory, listing of landmarks as an instrument of cultural politics, real estate markets dynamicity, institutional action and social-political processes»²⁴.

The 216th article from the 1988 Brazilian Federal Constitution defines Brazilian cultural heritage as goods of material and immaterial nature, «taken individually or as a group, which express the identity, the action, the memory of different groups that formed Brazilian society». It presents distinct forms of public power, in collaboration with the community, concerning protection of the Brazilian cultural heritage, either by «means of inventories, registrations, monitoring, protection or dispossession, as well as other forms of precaution and preservation»²⁵.

From the decade of 1980, it was possible to identify five interrelated developments in Brazil, such as the trend of municipalization of protection politics; the democratization of decision-making powers; the understanding of the importance of urbanism; the adoption of compensatory measures and, finally, the political and articulated formulation of protection measures, not only by listing protected sites as landmarks²⁶.

One of the main challenges concerning the protection of cultural goods, between the end of the 20th and the beginning of the 21st century, was the necessity of a new perspective concerning the listing of cultural goods as landmarks, which is considered «as a process of selection of the indemnity aspects, as well as its combination with other instruments of protection of immaterial goods, in the urban politics level, with other urban instruments established by the Statute of the city, Law no. 10257 of June 10th, 2001»²⁷. It also indicates other challenges, such as the extension of the concept of social function with respect to preservation policies; a more effective participation of society in heritage policies; the necessity of a balance between preservation and sustainability, and, finally, the importance of protection of cultural goods, from a «perspective considering the fuzzy interests of memory, as well as collective enjoyment and the integrity

²³ E. Fernandes, B. Alfonsin (edd.), *Revisitando o Instituto do Tombamento*, Belo Horizonte, Editora Fórum, 2010, p. 15.

²⁴ *Ibid.*, p. 17.

²⁵ Brazilian Federal Constitution, 1988, § 1^o. Article 216. Available at: <http://www.planalto.gov.br/ccivil_03/constituicao/constituicao.htm> (last access: 30.09. 2017).

²⁶ E. Fernandes, *Do Tombamento ao Planejamento Territorial e à Gestão Urbana*, in E. Fernandes, B. Alfonsin (edd.), *Revisitando o Instituto do Tombamento*, Belo Horizonte, Editora Fórum, 2010, p. 34.

²⁷ M.C. PIRES, *Proteção do Patrimônio Cultural: da monumentalidade aos bens imateriais* in E. Fernandes, B. Alfonsin (edd.), *Revisitando o Instituto do Tombamento*, Belo Horizonte, Editora Fórum, 2010, p. 85.

or permanence of intangible and material references, which must involve the jurisdictional, social and political dimensions»²⁸.

When analyzing culture as heritage, Honório Velasco highlights that the notion of culture is ample, indefinite and encompasses practically everything. Alternatively, the notion of heritage is limited to a definite series of elements, that is, cultural heritage is strategically selective. Therefore, when transforming a cultural good into a landmark, it is necessary to make a forced reduction of the ample concept of culture²⁹. In addition, when considering aspects concerning cultural goods, we must take into account the importance of the immaterial greatness that cultural goods express, that is, even needing a material support for its existence, cultural goods are, essentially, intangible goods³⁰.

In the 21st century, material, immaterial and global cultural heritage is understood as something in constant movement, constructed by humankind in a certain time and place. It demands «la conciencia o sentimiento de que nos pertenece, de que ese algo es de algún modo valioso y de que, por tanto, precisa ser conservado y protegido»³¹.

Concerning studies about historical-educational heritage, researcher Jury Haystack highlights that it consists in a recent and modified category, which was based on categories used to describe school property, such as schools' cultural and historical heritage, as well as schools' cultural goods. With respect to its semantic meaning, it is described as a «complesso dei beni materiali e/o immateriali fruiti e/o prodotti in contesti educativi formali e/o non-formali nel corso del tempo»³².

Studies about this theme consist in a transnational movement, which expresses globalized school models and a common materiality. Therefore, «it expresses simultaneously convergent and specific modalities to preserve educational heritages and school culture, and there are homologous segments among different countries». On the other hand, these studies also carefully analyze particularities of national systems of education, taking stock of global and regional trends³³.

²⁸ *Ibid.*, p. 17.

²⁹ H.M. Velasco, *La cultura como patrimonio. Lo material y lo inmaterial en la cultura*, in: A. Escolano, (ed.), *La cultura material de la escuela en el centenario de la Junta para la Ampliación de Estudios, 1907-2007*, Berlanga de Duero/Soria, Varona S.A., 2007, p. 36.

³⁰ C.F. Souza Filho, *Tombamento e Registro: dois instrumentos de proteção*, in: Fernandes, Alfonsin, (edd.), *Revisitando o Instituto do Tombamento*, cit., pp. 163-174.

³¹ A. Viñao, *Memoria, Patrimonio y Educación*, «Revista História da Educação. ASPHE», vol. 15, n. 33, 2011, p. 34.

³² J. Meda, *La conservazione del patrimonio storico-educativo: il caso italiano*, in: J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en Espana: balance y perspectivas*, Macerata, eum, 2013, p. 169.

³³ M. J. Morgarro, A. Namora, *Educação e Património cultural: escolas, objetos e práticas, perspectivas multidisciplinares sobre a cultura material*, in: M.J. Morgarro (ed.), *Educação e Património Cultural: escolas, objetos e práticas*, Lisboa, Edições Colibri, 2015, p. 27.

In the Spanish context, we can highlight many initiatives undertaken by pedagogical museism, which stimulated studies in the field of educational heritage³⁴. With the creation of the first pedagogical and history of education museums, centers of documentation and school memory, as well as the first meetings and forums on the subject, a line of research was created around the description of historical-educational heritage, museology and museography of education. This movement culminated with the organization of *Spanish Society for the Historical-Educational Heritage Study* (SEPHE), created officially in 2004.

In 2008, the *Participación Educativa* Journal, from State School Council, published a dossier entitled *History of oblivion: heritage in school centers* [Historia de un olvido: patrimonio en los centros escolares]. Analyzing school spaces as historical heritage and memory places, Antonio Viñao Frago states that these spaces consist in a sort of «container», in which historical-educational heritage is produced, preserved or destroyed.

Un patrimonio formado no sólo por espacios y edificios, sino también por objetos procedentes del exterior (libros de texto, material didáctico y científico, mobiliario y enseres diversos, etc.) o producidos por el mismo medio escolar como, entre otros, los ejercicios y exámenes de los alumnos, los trabajos manuales, los cuadernos y diarios escolares, las fotografías propias del mundo escolar, los diplomas y títulos o los expedientes académicos³⁵.

Considering studies about culture, spaces and school architecture, we dialogue with the notion of cultural heritage and support the idea that school buildings consist in a material support for survival of school immaterial culture. Based on this perspective, we analyze Reports of the Direction of Public Instruction and Public Works of the State of Rio Grande do Sul, in order to identify the first constructions undertaken by the public power, as well as aspects of its trajectory, current situation and cultural heritage preservation policies. After that, we approach questions concerning historical-educational heritage.

³⁴ We can cite as examples the initiatives of creation of the following museums: Museo Pedagógico La Escuela de Ayer and Museo del Niño (Albacete), both created in 1987; Museo Pedagógico de Aragón; Museo del Niño y Centro de documentación Histórica de la Escuela; Museo Pedagógico de Historia de la Educación Manuel Bartolomé Cossío (Madrid), created officially in 1990; Museu de l'Educació de les Illes Balears, organized in 1995/96, but created officially in 2001. X. Motilla, *La conservació i l'estudi del patrimoni historicoeducatiu a Espanya en l'actualitat*, «Educató i Història. Revista d'Història de l'Educató», n. 17, 2011, pp. 261-270.

³⁵ A. Viñao, *As disciplinas escolares*, «Revista Brasileira de História da Educação», n. 18, 2008, p. 25.

2. «From the bricks to the memory tree»

Problematising questions related to stories and forgetfulness around Rio Grande do Sul's primary schools, we selected two institutions built between 1919 and 1922, in the city of Porto Alegre. Intending to establish an interlocution with historical-educational heritage, we investigated aspects concerning these schools' trajectories and their current situation, discussing preservation and conservation policies.

The first case analyzed in this study is the Elementary Course, annexed to the Complementary School, projected by engineer Theophilo Borges de Barros, located at General Auto Street, downtown, and built between 1919 and 1922. At the time, the Direction of Public Works said:

A beautiful building, in a neoclassical style in which Corinthian-order ornaments predominate, is being constructed at the General Auto Street. For its construction, in March 6th of this year, 11 candidates applied. From the presented proposals, Engineer Adolpho Stern's, was accepted, which amounts to: 381:040 \$900. The official budget was of: 451:479 \$600. The foundations are executed by the administration, which is a practice already adopted in all of our important construction works³⁶.

The costs for land preparation and building foundations were high, due to the sloping terrain and the necessity of land displacement. The Direction of Public Works, in 1919, highlights the dimensions of the building; its construction started on June 20th, in the same year:

The building is composed of a main body and two sections, between which there is a central patio of 12 X 20 meters. The total covered area is of 1.200 square meters. It has 23 rooms with capacity of 50 students; 4 great halls of 9 X 11 meters, with capacity of 60 to 70 students. It also has 3 great rooms in the basements, which can be used as classrooms, as well as two ample offices. Its main entrance will be at General Auto Street³⁷.

The need of a new space for Complementary School of Porto Alegre was defended by the Direction of Public Instruction, considering that the institution building at the corner of Duke de Caxias Street and General Auto Street, built

³⁶ The currency in Brazil was called *Real*, in the plural and popularly known as *Réis*, had Portuguese origin. Used since the colonial period, it was replaced by the *Cruzeiro* in the year of 1942. From 1994, the nomenclature returned to the country with the Real Plan, implemented by the government of Itamar Franco. Report by the Direction of Public Works of the Government of the State of Rio Grande do Sul, 1919, p. 10.

³⁷ Report by the Direction of Public Works of the State of Rio Grande do Sul Government, 1919, p. 12.



Pic. 1. Complementary School of Porto Alegre/RS (1922). From: *Public works: centennial of Independence*, Porto Alegre, Officinas Gráficas d'A Federação, 1922.

in 1904, did not have enough room for the students³⁸. The new building would have a capacity of two thousand students³⁹.

In 1920, details of the construction were described, highlighting some alterations in the original project, with an increase of the expenditures, as well as services in advance. The hygienical question was pointed as one of the basic requirements, over all, concerning the need of a school space. This necessity should not have to be guided only by pedagogical guidelines, but, to a

large extent, by processes of reorganization of urban spaces that were lined up to public health rules. Preventive medicine, which had a social appeal, in opposition to the clinical model, redefined a new idea of medical mission in the first decades of 20th century. It was necessary to focus on the healthy ones, to prevent the propagation of diseases through instructive measures⁴⁰.

The Complementary School construction was concluded in 1922, providing most of the classes of the Elementary Course annexed to the Complementary School:

The construction of a great building at General Auto Street was concluded, with 22 ample classrooms, a party room and offices for laboratories and teaching staff. A great, conveniently equipped gymnastics pavilion is under construction. In this building, most of the lessons of the elementary course annexed to the School take place, under immediate direction of Pedagogy professors⁴¹.

The building was given to the Interior and Exterior Department, in 1922, and, in addition to classes, administrative activities of this department were organized

³⁸ Between 1920 and 1921, the Complementary School registration system included, according to a Report by the Direction of Public Instruction, 1.950 students (DIP/RS, 1921, vol. 2, p. 31). As we pointed out previously, the building that would originally be occupied by the Complementary School, built between 1904 and 1906, was then occupied by the Department of Public works. The Complementary School was at the Ateneu Rio-Grandense building. For a detailed study on the subject, see: D. Gonçalves, *A instrução pública, a educação da mulher e a formação de professores nos jornais partidários de Porto Alegre/RS (1869-1937)*, PhD thesis. Faculdade de Filosofia e Ciências Humanas (Advisor: M. H. Bastos), Porto Alegre, Pontifícia Universidade Católica do Rio Grande do Sul, Academic Year of 2013.

³⁹ Report by Direction of Public Works of the State of Rio Grande do Sul Government, 1921, p. 10.

⁴⁰ M. Stephanou, *Tratar e Educar: discursos médicos nas primeiras décadas do século XX*, PhD thesis, Faculdade de Educação (Advisor: E.-M. Faermann), Porto Alegre, Universidade Federal do Rio Grande do Sul, Academic Year of 1999.

⁴¹ Report by Direction of Public Works of the State of Rio Grande do Sul Government, 1922, p. 21.

in the same space. According to Direction of Public works, «the working rooms [Interior and Exterior Department's] were isolated from the school routine, so these activities would not disturb one another». When the construction was completed, the following works, among others, were done: internal and external stone pavement, laying of iron gates, general installation of electric light and sewage, and construction of the main entrance stairs, with reinforced concrete and marble coating⁴².

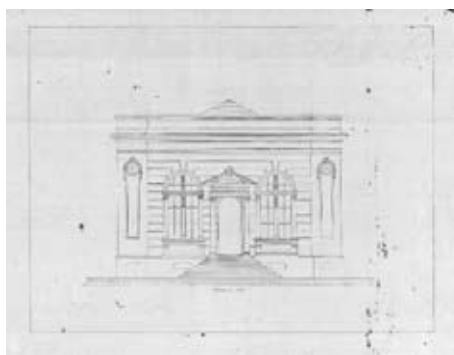
As we can observe above in the figure, the monumental building had an impressive entrance gate, with two columns in neoclassic style, in compliance with the project of Fernando Gomes Elementary School, located in Porto Alegre downtown vicinity. Another important characteristic consists in the staircase, highlighted in the photograph, which gave access to the Government Palace area.

In 1922, the gymnastics pavilion was under construction, following the same aesthetic guidelines of the main building, with a staircase and an entry hall, as well as storages, a stage and restrooms. In 1924, the Direction of Public Works added a series of internal elements, such as: brick masonry in the main and dividing walls; coating and balustrade exclusion at the internal balcony; iron roof framework; wooden ceiling and ruberoid roofing; covering of concrete in the basement; general flooring; internal stairs, plastering, gutters and sewer pipes. The building, projected by engineer Theophilo Borges de Barros, was supervised by engineer João Pianca⁴³.

According to data provided by Direction of Public Instruction, the Complementary School of Porto Alegre registrations included, until April of 1923, 2.620 students. The Complementary School had always been associated to the annexed Elementary Course, until, in 1927, by order no. 2293/3, of



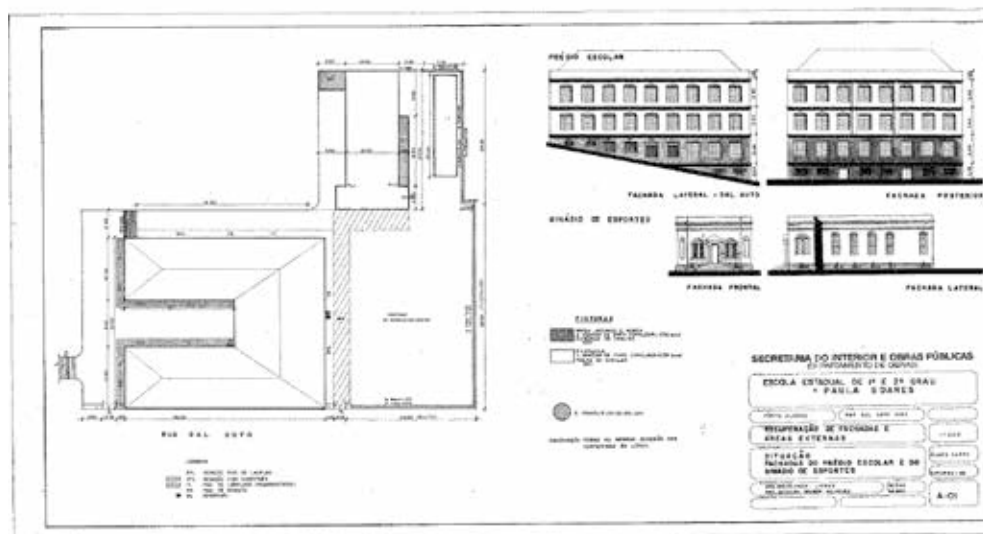
Pic. 2. Complementary School - annexed Elementary Course (1924). From: Report by the Direction of Public Instruction/RS, 1924.



Pic. 3. Gymnastics Pavilion at Paula Soares School. From: Direction of Public Works/RS Map Collection.

⁴² Report by the Direction of Public Works of the State of Rio Grande do Sul Government, 1922, p. 7.

⁴³ Report by Direction of Public Works of the State of Rio Grande do Sul Government, 1924, p. 73.



Pic. 4. Paula Soares State School Recovery Project (1988). From: Map Collection of the Direction of Public Works of the State of Rio Grande do Sul Government, 1919, p. 12.

May 21st, the Interior and Exterior Businesses State Department established its autonomy from the complementary school, and its name was changed to Paula Soares Elementary School⁴⁴.

As it is recurrent in educational institutions, throughout its trajectory, Paula Soares Elementary School's name was changed several times. In 1939, it was called «Paula Soares School Group» and, in 1955, by Decree number 13.196, of January 5th, «Paula Soares Feminine Gymnasium» was created in the same building, separately from the School Group. Still in the 1950s, by Decree number 9.432/1958, it was renamed to «Pio XII State Gymnasium», and, in 1962, the school was given the name «Pio XII State School», and operated together with the School Group (Decree number 13.196). By Decree number 31.734, from 1981, both schools were unified, being renamed to «Paula Soares Elementary and Secondary State School», until Decree number 00307, from the 2000s, modified its name to «Paula Soares State School», which is the school's current name⁴⁵; the institution provides elementary and secondary education.

⁴⁴ The name of the institution was a homage to professor Francisco de Paula Soares (1825-1881), born in Montevideu, Uruguay. His teaching activities started in Brazil, in the city of Rio Grande/RS, as a primary teacher. In Porto Alegre, from 1851 onwards, he started to teach History and Geography at Dom Affonso School. After that, he taught at Porto Alegre Normal School. Source: <<https://www.if.ufrgs.br/tex/edu02220/sem012/po2/texto282.html>> (last access: 28.09.2017).

⁴⁵ Department of School Inspectorship, Rio Grande do Sul Secretary of Education, August of 2004.

Retaking the construction issues, it is important to point out that this place was reformed many times throughout its existence, under the command of Direction of Public Works. A general reform was made in order to recover the façades, by painting the external and internal areas of the school building and the sports gymnasium (gymnastics pavilion), in the year of 1988. In addition, there was a removal of tile and concrete floors, as well as tile and basalt floors reuse, as the following project shows.

In a recent visit to the school, we verified that the superior floor was closed by the 1st Coordinating Body of Public Works, since July of 2016, due to problems related to the roof, which cause water leakage. The classrooms of other floors were divided for continuation of the school activities, because the school board and the school community had refused to be placed in another building. According to the school's current principal, the access ramp was handcrafted, by means of an adaptation of a side of the main staircase, which gives access only through the entrance gate, without a general plan of accessibility, required by the Brazilian Technical Standards Association (ABNT).

The old gymnastics pavilion is in precarious situation, both in the external and internal areas, but it is still being used for some school activities, such as meetings and some festivities. In front of it, an open sports court was built, and is used by students for practice of physical activities.

At the entry hall, there is a painting in commemoration of the 75 years of the institution, since it became independent from the complementary



Pic. 5. Paula Soares State School access ramp (2016). From: author's private collection.



Pic. 6. Gymnastics Pavilion façade at Paula Soares State School (2016). From: author's private collection.



Pic. 7. Representation of Paula Soares State School's entrance gate (2016). From: author's private collection.

school, in 1927, when its name was «Paula Soares Elementary School». The representation of the entrance gate and of the students, the different names, trophies and symbols demonstrate an attempt to recollect and perpetuate, in the walls of the school, its long journey.

The school building integrates the area surrounding Piratini Palace – the headquarters of the State of Rio Grande do Sul government, a landmark protected by IPHAE since 1986, and by IPHAN, since the 2000s. Therefore, the school is in an area protected both by state and federal entities, and any modifications need to be analyzed by these responsible agencies. However, as we verified in visits to the school, the situation of the building is very precarious and worrisome, because, in addition to the closing of the superior floor for safety reasons, the construction has structural and aesthetic problems, especially related to internal and external painting, windows, accesses, floors and staircases. Concerning the school's permanent archives, according to the school board, the material is placed at the closed area, which is exactly the most humid place of the building, due to roof problems.

Paula Soares State School's building was constructed in one of Porto Alegre's historical spaces, which, in addition to the Government Palace, includes the Metropolitan Cathedral, the São Pedro Theater, the Legislative Council and other buildings that form part of the city's heritage. With monumental proportions, it is still active among the silence of Rio Grande do Sul's historical-educational heritage.

Another case that that we analyzed was Tristeza School Group, built in Porto Alegre's southern zone, receiving this name because of the Tristeza district, in which it is located. Its construction started in October of 1922:

It has six classrooms, one for the school board, one for the school museum and one for the janitor. It has two floors, with a total area of approximately 600 square meters. The construction was awarded in a public contest, for the price of 73:500 \$000, and the budget is 86:545 \$084. On November 15th, the Foundation Stone was solemnly launched, and the works continued regularly until last April, when they were suspended. The expenditures in 1922 amounted 3:697 \$982⁴⁶.

The building should have room for 300 students, distributed in 6 classrooms, connected by covered balconies. The construction was made through a public contest won by engineers Sylla & Carvalho, who had a construction firm of Porto Alegre, and the amount paid was 73:500 \$000. The budget was of 86:545 \$084, and, during the year of 1922, the expenses amounted 3:697 \$982. It was projected by Engineer Pedro Paulo Scheunemann, who also supervised and directed the construction execution⁴⁷.

⁴⁶ Report by the Direction of Public Works of the State of Rio Grande do Sul Government, 1923, p. 6.

⁴⁷ Report by the Direction of Public Works of the State of Rio Grande do Sul Government,

In the following year, although the works were paralyzed in March, the government highlighted that the construction process was advanced, and that “the masonry part was almost finished, the covering with French roofing tiles was completed, so were most of the partition walls. All the timbering process was done”. The only remained work concerned coverings, framing, floors, installations and painting⁴⁸.

However, a new standstill, of 3 years, caused a significant delay, and the building was concluded in March of 1927. According to Direction of

Public Works, in addition to the 6 classrooms and other 3 rooms – one for the school board, one for teachers and another one for the school museum –, a «reservoir of 4 cubical meters for water was constructed, and a land next to the School Group was bought, which had 1.600 square meters for recreation and gymnastics; in addition, the front and the sides of the building were afforested, and the land was fenced with wire mesh attached to granite fence posts»⁴⁹.

The hygienical issue can also be categorized as an important factor in the case of this construction, considering that, after the conclusion of the building, some sanitation works were carried out, which consisted in the installation of «12 toilets, 4 lavatories, 1 kitchen sink, 2 urinals, 1 shower, 1 laundering tank, 1 grease box, all the existing net of shackles and pit, as well as all the ventilation system»⁵⁰. A Berckefeld pressure filter was also installed».

One year after classes began, the school was reclassified as 1st sub-division elementary school, and was renamed to Arrabalde da Tristeza Elementary School. In report by the Direction of Public Instruction, in 1929, the school is mentioned, and, according to the document, it had 8 teachers and 322 students at the time. In homage to the 1930 Revolution, the school was renamed to Três de Outubro Elementary School, through Decree no. 4.638, of November 14th, 1930⁵¹. The institution was renamed, in 1939, to «Três de Outubro School



Pic. 8. Tristeza School Group Building (1927). From: Report by the Direction of Public Works/RS, 1927, p. 46.

1923, pp. 29-30.

⁴⁸ Report by the Direction of Public Works of the State of Rio Grande do Sul Government, 1923, p. 72.

⁴⁹ Report by the Direction of Public Works of the State of Rio Grande do Sul Government, 1927, p. 8.

⁵⁰ Report by Direction of Public Works of the State of Rio Grande do Sul Government, 1929, p. 93.

⁵¹ More specifically, the homage concerns a meeting of a group of revolutionaries, on October 3rd, at Great Hotel, in Porto Alegre. The place was transformed into their headquarters, and is one of the most important landmarks of the 1930 Revolution.



Pic. 9. Três de Outubro State Elementary School (2014). From: author's private collection.



Pic. 10. Três de Outubro State Elementary School façade (2014). From: author's private collection.

Group», and, in 1971, its name changed to «Três de Outubro Elementary School». Since the 2000s, its name is «Três de Outubro State Elementary School». It is located at 2560 Wenceslau Escobar Avenue; its main building is surrounded by walls and annexed buildings that were subsequently constructed.

In the 1950s, the land of the school and the building were reformed in order to have room for more students; the renovation included: closing of an alley between Otto Niemeyer Street and Wenceslau Escobar Street; construction of a house for the school guard, of a two-story building with 8 rooms at the back (Armando Barbedo Street), of a cafeteria, a party and recreation room, a building with 8 more classrooms and an exclusive patio for Preschool Education students (Wenceslau Escobar Street)⁵².

In a visit to the institution, in 2014, we found that the situation was critical, due to serious structural and infiltration problems at the roof of the historical

building. As we can observe in the following image, throughout the years, coatings were applied on the façade of the building, as well as tiles on most of the internal walls, and the upper floor balcony was closed.

The school archives were in a room at the back of the building, with serious problems related to minimum preservation conditions. At the time, the school board conserved in this room some old photographs and news articles about the institution, because of its anniversary commemoration. After many appeals for recovery of the historical building and the other edifices that were built in the same land, the school was widely reformed in 2015, including modifications such as: reform of roof, linings and floors; general painting; sanitary and hydroelectric installations, such as System of Protection against Electric Discharges (SPDA) and Plan of Prevention and Protection against Fire (PPCI); and reform of the wooden building and fences. The reforms were undertaken by the company Porto Redes Construções e Instalações Ltda.

⁵² T. Mello, *Os 120 anos, o Colégio Três de Outubro se mantém vivo*, Porto Alegre, Mimeo, 2004.

In the period of the reforms, classes took place at the other annexed buildings. After the reform was finished, the historical building was kept as a place for administrative and pedagogical activities, also including a library, an auditory, the teachers' room and a video library. External and internal tile coverings, as well as external platelets, were removed; its historical façade was recovered and the original characteristics were conserved.

The first floor of the historical building includes, currently, the school board and secretary rooms, service of educational orientation department, teachers' rooms and video library. There is also a small winter garden, with some benches that were used at the patio. On the superior floor, there is the library room and the auditory, where the school keeps a piano, which has not been restored.

One of the most significant transformations was at the entry hall, which was, before the reform, covered with blue tiles; now it has a painting on the wall representing a tree, with a series of framed photographs that register different moments of the institution's trajectory. Organized through tree branches, it recalls moments from 1884 – showing the house where the classes started in the neighborhood, under coordination of teacher Julieta de Miranda Alvarez –, to March of 2016, when the reform was finished. On the right side of the tree, we can see a frame with a brief history of the institution, since the end of 20th century, when the classes took place at a rented beverage room in a warehouse at Otto Niemayer Street, under coordination of teacher Otília Olívia Barbosa.

The hung photographs have textual explanations that describe aspects of the history of some teachers and school boards, commemorative plaques, judo project, as well as registration of the moment of signature of the contract, in December of 2014, even mentioning the team that executed the reform, as shown on the following figure.

With the recent restoration, in addition to the historical building recovery, the school community received other spaces in better conditions to develop school activities, such as auditory, computer laboratory and video library. The bars that were installed in the façade and the openings of both floors have been kept, due to institutional security matters. Três de Outubro State School building is not included on any state list of landmarks of cultural interest and preservation: neither on the IPHAE list, nor on the Porto Alegre EPAHC list. Therefore, the edifice cannot be modified at any time, which already happened in different moments of the school's trajectory.



Pic. 11. Três de Outubro State School main entrance (2016). From: author's private collection.

Final remarks

The interlocution between school architecture and historical-educative heritage consists in a work that involves different public spheres, institutions and citizens, as well as its problematization as a material and immaterial educational property. Getting to know the discourses, projects, models, typologies, languages, symbols and representations, among innumerable other possible elements and meanings, based on the school building in its varied forms and contexts, enables different perspectives on the past, the present and the future of these institutions.

Concerning Paula Soares State School, annexed to the Government Palace, although it is located in an important area of preservation of Porto Alegre historical center, it has a worrisome structure situation, and its last general reform was in the late 1980s. Since June of 2016, there is an interdiction of the last floor due to problems of infiltration in the roof. The access ramp was constructed without any project provided by responsible agencies, and the school has not any covered sports court. As stated before, the gymnastics pavilion is abandoned and, as well as the main building, it needs repair and has to be remodeled to fit the necessities of a contemporary school space.

As for Três de Outubro State School, located in Porto Alegre's southern zone, which was in a very precarious structural situation, there was a significant reform of the building in 2015. The internal and external installations were totally restructured, and spaces at the historical building, used for administrative and pedagogical purposes, were restored, such as video library, auditory, and teachers' room. In addition, a sort of «memory tree» was created in the entry hall, registering a series of different historical moments of the institution. This building is not registered on any municipal or state protection and/or preservation list.

One of the most recurrent issues concerning historical school constructions, in addition to the need of reform and restoration, is the remodeling of these school spaces to meet the current norms, such as: universal accessibility, established by ABNT, the System of Protection against Electric Discharges (SPDA) and the Plan of Prevention and Protection against Fire (PPCI). The buildings have to comply with security standards and, moreover, to contribute to new demands of an inclusive educational process, providing a physical environment in which different and new elements coexist, and following a preservation policy.

With respect to public institutions responsible for inventory and protection processes, as well as other mechanisms of historical-cultural heritage preservation, we found that there is not a systematic concern around the architecture of the first public buildings designed for primary schools in the state of Rio Grande do Sul. The two analyzed institutions are not registered on any list of protected sites, neither by the Institute of Historic Artistic Heritage of Rio Grande do Sul (IPHAE), nor by federal instances.

Concerning the discussion around cultural heritage and education, according to the Unesco Convention for the Safeguarding of the Intangible Cultural Heritage, from 2003, it is difficult to distinguish material from immaterial heritage in the cultural context. As for objects that are part of educational activities, «son un soporte físico culturizado, ciertamente, y por ello son un producto cultural sobre el que descansan significados y la información; en tanto que lo inmaterial o que lo intangible, por otro lado, no existe por lo general sino en función de referentes materiales»⁵³. Therefore, the author states that «tanto los espacios como las prácticas y materiales de las instituciones educativas son bienes culturales, porque son realidades llenas de significado y testimonio»⁵⁴.

The experiences reported in this paper represent a complex overview concerning preservation and conservation of school architecture, involving different instances and public powers, school communities, history, education and architecture researchers, who must line up with the discussions about heritage, in a more broadly sense, and about historical-educational heritage, in particular. In this perspective, school buildings are understood as school culture supports, that is, without the preservation of these spaces, it is not possible to conserve the history and the memory of education.

⁵³ A. Mayordomo, *Prólogo*, in P. Álvarez (ed.), *Los Museos Pedagógicos en España. Entre la memoria y la creatividad*, Gijón, TREA Ediciones y Editorial Universidad de Sevilla (EUS), 2016, p. 13.

⁵⁴ *Ibid.*, p. 14.

Foreign schools in Thessaloniki from the perspective of the Ottoman State (1850-1912)*

Fatih Demirel
Faculty of Education
Bursa Uludag University (Turkey)
fatihdemirel@uludag.edu.tr

ABSTRACT: During the education reform process of the Ottoman Empire, Thessaloniki always had a significant place. In Thessaloniki, a variety of schools were established by foreigners at the levels of primary and secondary education and high school. These schools were established by France, Italy, England, Germany, the USA and Romania. This study aims to provide an insight into the foreign schools established in Thessaloniki during the period of Ottoman education modernization. To this end, these schools established in the name of different countries were examined in terms of their educational activities, their missions, the efforts of the Ottoman administration to control them, and also the problems experienced.

EET/TEE KEYWORDS: History of education; Education modernization; Ottoman; Foreign schools; Thessaloniki; XIXth-XXth Centuries.

Introduction

Even before the Tanzimat (Reforms) period, numerous educational institutions were established by non-Muslims and foreigners within the Ottoman geography. Though these schools were initially religion based, their national identities became more important in the 19th century. Though the Imperial Edict of Reorganization (Tanzimat Fermanı) did not include any legislation related to education and training, the Royal Edict of Reform (Islahat

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Fermanı) gave the non-Muslims to establish their own schools¹. The right of establishing schools to non-Muslims with the Royal Edict of Reform (Islahat Fermanı) was legally granted; however, the rules, regulations, opening criteria, and inspection procedures were not decided for a long time. The nationalist and separatist feelings and the legal gap in the Ottoman system paved the way for a rapid increase in the number of foreign schools and the schools opened by non-Muslims. Considering the political atmosphere in the country, it would not be challenging to say that the foreign and non-Muslim schools were not only educational institutions, but also a platform to run political agenda. Although the Ottoman central government was well aware of this reality, they did not take a serious step towards the control of those schools until the Maarif-i Umumiye Nizamnamesi (Regulation on General Education) which took effect in 1869. Even if it covered a very narrow area, the Customs Regulation (Gümrük Nizamnamesi) dated 1868 decided that all materials to be used for foreign schools should be passed through customs after being examined².

After the Royal Edict of Reform (Islahat Fermanı), the increase in the number of foreign and non-Muslim schools and their superior qualities over the state schools forced the Ottoman central government to compete with them both quantitatively and qualitatively in an effort to take them under control. The Maarif-i Umumiye Nizamnamesi (Regulation on General Education) defined by the Ottoman education system also regulated the rules that would be applied to the foreign and non-Muslim schools.

Essentially the schools were separated into two by the Regulation. One of these was the official schools affiliated to the State and the other was the private schools which were established and managed by persons or congregations³. Foreign and non-Muslim schools were also considered as special schools and the conditions for their opening were established⁴. This regulation gave the authority and responsibility of inspecting the schools to the directors of education in the provinces⁵. After the establishment of the education organization in the provinces, a decree containing the duties and responsibilities of the education directors was prepared on 13 December 1896. In the decree consisting of 61 items, it was decided that the administrators would inspect the non-Muslims and foreign institutions at least three times in a year. The points to be noted in

¹ Cemil Koçak, *Tanzimat'tan Sonra Özel ve Yabancı Okullar*, «Tanzimat'tan Cumhuriyet'e Türkiye Ansiklopedisi», vol. 2, 1985, p. 485.

² İlknur Haydaroglu, *Osmanlı İmparatorluğu'nda Yabancı Okullar*, «Türkler», vol. 14, 2002, p. 183.

³ Mahmud Cevad İbn'üş Şeyh Nâfi, *Maarif-i Umumiye Nezareti Tarihçe-i Teşkilat ve İcraatı*, Matbaa-i Âmire, 1338, p. 470.

⁴ İ. Haydaroglu, *Osmanlı İmparatorluğu'nda Yabancı Okullar*, Ankara, Kültür Bakanlığı, 1990, p. 28.

⁵ Mahmud Cevad İbn'üş Şeyh Nâfi, *Maarif-i Umumiye Nezareti Tarihçe-i Teşkilat ve İcraatı*, cit., p. 498.

those inspections were also described in detail⁶. However, it was understood that all these decisions could not be fully implemented⁷. During both the Tanzimat (Reforms) and the reign of Abdulhamid II periods, the foreign and non-Muslim schools continued to be established unlicensed, and those who were already established did not find it necessary to obtain a license. However, it was also a fact that numerous controls and inspections were implemented and unlicensed schools were forced to obtain licenses.

Finally, it is necessary to note the distinction that the schools established in Thessaloniki by non-Muslims would be regarded in the status of non-Muslim and foreign schools. In Thessaloniki apart from the schools of French, Italian, English, German, American and Romanian origin, there are numerous schools opened by the Greeks, Bulgarians, Serbs, Jews, Wallach and Armenians that are regarded in non-Muslim status. Countries such as Greece, Bulgaria, Serbia and Romania, which gained their independence by secession from the Ottoman State, became the border states. However, the Greeks, Bulgarians and Serbs continued to live within the borders of the Ottoman Empire and in Thessaloniki as Ottoman citizens. Therefore, the schools opened by the abovementioned entities were categorized as not foreign, but non-Muslim schools. Only Romania was excluded from that category and was considered as a foreign school. The main reason for this was that the Ottomans were not willing to accept any ties of the Wallach with Romania. It should be noted here that although the Ottoman State categorized the Greek, the Bulgarian, the Serbian and the Wallach schools as non-Muslim and wanted to keep them away from the influence of the same bordering neighbor states, it failed to do so. The abovementioned states had been influential on those schools and were thus in an effort to extend their areas of influence in Macedonia in general, in Thessaloniki in particular.

Foreign Schools in the province of Thessaloniki

We can learn the numerical data about the educational institutions in the province of Thessaloniki from a variety of sources such as State records, Thessaloniki provincial yearbooks, ministry of education yearbooks and statistics. Even though the data in the sources mentioned above are not precise and error-free, they provide a general assessment about the education and training status of the province. There were primary schools, secondary schools, and high schools opened in the province.

⁶ *Vilâyet-i Şabane Maârif Müdürlerinin Vezâifini Mübeyyin Ta'limât, Salname-i Nezâret-i Maârif-i Umûmiye*, (Yearbook of the Ministry of National Education) [hereafter «SNMU»], stanbul, 1316, pp. 136-156.

⁷ Haydaroğlu, *Osmanlı İmparatorluğu'nda Yabancı Okullar*, cit., p. 184.

When the statistics are examined, it is understood that there were three schools established by foreigners at the level of primary school in the province in 1890. Two of these three schools that were day schools, were unlicensed. One of the schools belonged to the British, two to the Italians⁸. In the 1894-1895 academic year (Rumi 1310-1311), there were a total of 825 students, 290 male and 535 female students studying at the primary schools. There were eight male and sixteen female – twenty-four altogether – teachers appointed at these schools⁹. In the following academic year, a boarding French primary school without a license was added to the existing foreign schools. Despite the fact that the number of schools increased reaching four schools, there was a decrease in the number of students; a total of 768 students – 284 males and 484 females – attended these schools. The number of teachers increased during the same academic year as 33 teachers – 11 male and 22 female teachers – were working at those schools¹⁰. However, the yearbook of Thessaloniki covering the years 1893 and 1894 reported that three schools were licensed in Thessaloniki. Two of these belonged to the British and the other one to the Germans. It was a primary school for girls from the British Protestant schools in Malta. The school in Hamidiye was a mixed-gender primary school for girls and boys. The German primary school, on the other hand, was located in the Çayır district¹¹. Obviously, there are inconsistencies between the statistical data.

There are six secondary schools opened by foreigners in the province of Thessaloniki. One of the schools belongs to the Germans, one to the Romanians, and the last one to the French. Only one of the French Schools is in Kavala and the others are in Thessaloniki. In the German School, there were also girls who studied there. The German school (*Franco German School*) was vocational school focusing on commerce. The school used to be opened on the first day of September. Lessons, on the other hand, used to start on October 10th. During the 40-day period until the beginning of the lessons, there would be some re-sit examinations for students who failed in a few courses. On the other hand, during that 40-day period, lessons were given extra courses to the newly enrolled students to strengthen their weaknesses in the courses such as Turkish, French,

⁸ M. Anastasiadou states that there are 4 schools at the level of primary school, two of them for girls, and two for boys, in the province. M. Anastasiadou, *Tanzimat Çağında Bir Osmanlı Şehri Selanik*, Translated by I. Ergüden, İstanbul, Tarih Vakfı Yurt Yayınları, November 2001, p. 167.

⁹ *Maârif-i Umûmiye Nezâret-i Celilesi İdaresinde Bulunan Mekâtib-i İbtidâiye, Rüşdiye, dâdiye, Âliye ile Mekâtib-i Hususiye ve Ecnebiyenin ve Dersââdet'te Tahriri İcra Kılman ve Taşrada Mevcut Bulunan Kütüphanelerin İstatistiği*, 1310-1311 Sene-i Dersiye-i Maliyesine Mahsustur, Dersââdet, p. 55.

¹⁰ *Maârif-i Umûmiye Nezâret-i İdaresinde Bulunan Mekâtib-i İbtidâiye, Rüşdiye, İdâdiye, Âliye ile Mekâtib-i Hususiye ve Ecnebiyenin ve Dersââdet'te Tahriri İcra Kılman ve Taşrada Mevcut Bulunan Kütüphanelerin İstatistiği*, Matbaa-i Amire, 1318, p. 56.

¹¹ «Selanik Vilayet Salnamesi» (Yearbook of the Thessaloniki) [hereafter «SVS»], 12, 1311, p. 169.

German or other lessons and to those students who had to do preparatory class again to strengthen their weaknesses. The students who did not want to take a course for 40 days and lose one year in the preparatory class needed to register at the beginning of September by applying to the school administration¹². The Franko German School graduates also founded an association called *Franko German Academy Graduates Association*. The association organized various social activities for the school. The trip organized by the association to the village of Kireç, located near Thessaloniki on Saturday October 23, 1909 was covered on the Thessaloniki local press. It was stated in the news that the day trip was a lot of fun¹³. Although the French Sirs School was principally a school for girls, there was also times when it accepted boys as well. The names of secondary schools, their opening dates and the number of students by years are as follows.

School Name	Nation It belongs to	Opening Date	Number of Students by Academic Year									
			1897-1898		1898-1899		1899-1900		1900-1901		1902-1903	
German School	German	1885/6	M* 133	F** 50	M 137	F 45	M 132	F 51	M 139	F 56	M 143	F 61
Friars	French	?	260		273		285		285		289	
Catholic Priest	French	1884	57		61		-		-		37	
Sirs	French	?***	F 190		F 185		M 29	F 185	M 33	F 189	F 182	
Catholic****	French	1886/7	30		23		-		22		29	
Business and Commerce School	Romania	1883/4	-		-		72		92		103	
<i>Total</i>			720		724		754		816		844	

*Male

**Female

*** Although the opening date is not specified, it is stated that the school has a long history.

**** It is located in the town of Kavala subordinate to brigade Dirama.

Table 1. Foreign Secondary Schools and the Numbers of Students in the Province of Thessaloniki between 1897 and 1903¹⁴

When the data in Table 1 are examined, despite some deficiencies, it is understood that at the end of the 19th Century, approximately 800 pupils studied in the schools at the level of secondary schools in the province of Thessaloniki.

¹² «Zaman» (newspaper), n. 294, 31 August 1909, p. 2.

¹³ «Zaman», n. 347, 26 October 1909, p. 3.

¹⁴ «SNMU», Hijri (hereafter H) 1316, pp. 1072, 1073; H. 1317, pp. 1222, 1223; H. 1318, pp. 1364, 1365; H. 1319, pp. 636-639; H. 1321, p. 525.

Considering that in 1890 the foreign population in the Thessaloniki province was about 1,200¹⁵, it is understood that the primary goal of the schools opened by foreigners was not their own children. This data supports the view that the educational institutions opened by foreigners were the main instrument of influence of the Western countries on the Ottoman society¹⁶.

There were two foreign schools at high school level in the province and they accepted only male students. One of those high schools belonged to the French and the other to the Italians. Both of the high schools were vocational schools focusing on business and commerce. The school that belonged to the French and named as Business (high) School was opened in 1888¹⁷. The school, which used the name of the French İdâdî School (high school) of Thessaloniki, gave an advertisement to a daily called as «Zaman» newspaper, published in Thessaloniki and this school described itself as the most important science institution of the East. It is understood that the school buildings were rebuilt in 1906. In the following the issues of the newspaper, the advertisement text was revised for the promotion of the school. According to the advertisement, the school had a total 18 teachers in their teaching staff, 14 of whom graduated from the levels of business high school and business schools in France. Within the school, there was a trade branch for the young people who wanted to specialize in trade, art and banking for the preparation of university. By the way, there was also a special class at school for students who did not speak French. It was stated in the newspaper advertisement that a period of one year was enough to understand, read, and write in French at an excellent level. Some of the lessons included in the school curriculum were included in the text of the advertisement. French, ethics, mathematics, physics, chemistry, natural sciences, history, geography, and painting were available in the school's curriculum¹⁸. Even though it was not included in the advertisement, the school curriculum also had Turkish courses, which were compulsory by law. On August 31, 1909, the school placed an advertisement in the newspaper for a teacher who would give Turkish lessons, one full time and the other one part time to teach two hours every day. Those interested in the position were required to apply to the school administration personally¹⁹. It is quite normal to see that the school shows itself very successful in the advertisement. Actually there are some points that prove that the school was successful. For instance, Columbia University management agreed to accept and fund three Ottoman students every year over the course of ten years as of 26 January 1894. One of the students chosen to go

¹⁵ «SVS», vol. 11, 1310, p. 206.

¹⁶ Anastassiadou, *Tanzimat Ça mda Bir Osmanlı Şehri Selanik*, cit., p. 167.

¹⁷ «SNMU», H. 1316, p. 1072.

¹⁸ «Zaman», n. 278, 15 August 1909; n. 280, 17 August 1909; n. 282, 19 August 1909; n. 286; 23 August 1909.

¹⁹ «Zaman», n. 294, 31 August 1909, p. 2.

to Columbia University was Mr. Abdullah, who was fluent in French, German, and English, and a Thessaloniki French high school student. The fact that one of the students who were chosen to study at Columbia University was from Thessaloniki French high school, and Mr. Abdullah spoke three languages can be seen as a clear proof for the success of the school²⁰.

The school, opened by the Italians in 1887, was registered in education yearbooks as «the Italian School»²¹. The number of students of the French Business High School changed between 121 and 131 between the years 1898 and 1903. In the same years, the number of students in the Italian Business High School changed between 23 and 70²². Italian High School was the oldest business and commerce school in Thessaloniki. The school had a trade museum and a rich library. In the curriculum of the Italian Business High School, there were courses in Italian, French and German, mathematics, physical sciences, history, trade, geography, economics, civil and commercial law, accounting and commercial correspondence²³.

The above data are basically based on the official statistics of the Ministry of Education (Maârif Nezâreti). However, there was a foreign school in Thessaloniki not included in the statistics. In 1904, an unlicensed building was built near the village of Kapucular in Thessaloniki by an American named Edward, and education began in this building again without obtaining a license. The school was referred to as a Protestant School of Agriculture in some of the correspondences and mentioned to as an Industrial and Orphan School in some others. According to an inspection report of the provincial administration, in the school bought by the American named Edward and given the name of *American Protestant School of Agriculture*, there was a girl aged 17 or 18, a boy aged 12 and 10 orphans from the districts in the province of Manastır. Students spent 2 or 3 hours in the mornings working in the gardens near the school. Furthermore, Edward planned to teach English on the Protestant sect by building a large building there. The governor of Thessaloniki asked for an opinion from the Ministry of Education about how to act in this situation. The issue was not limited to Ministry of Education, but it was also echoed in the Ministry of Foreign Relations, Prime Ministry and the US Embassy. The US Embassy requested from the Ottoman Porte to attach the already established Industrial and Orphan School to the previously accredited list of *American School and Liberated Foundation and Sectarian* [Amerika Mekatib

²⁰ Başbakanlık Osmanlı Arşivi-Premiership Ottoman Archive (hereafter BOA), *DH. İD.*, 26-1/2 (28 Temmuz 1326-10 August 1910).

²¹ Anastasiadou refers to the school as the Umberto I School of Business and Commerce and the school was opened in 1888. The Education yearbook, on the other hand, refers to the opening date as in 1887. Anastasiadou, *Tanzimat Çağında Bir Osmanlı Şehri Selanik*, cit., p. 167.

²² «SNMU», H. 1316, pp. 1072, 1073; H. 1317, pp. 1222, 1223; H. 1318, pp. 1364, 1365; H. 1319, pp. 638-639; H.1321, p. 525.

²³ Anastasiadou, *Tanzimat Çağında Bir Osmanlı Şehri Selanik*, cit., p. 167.

ve Müessesat-ı Hayriyye ve Mezhebiyye]²⁴. This request of the US Embassy was rejected and as a result, it was decided that it was not possible to carry out any education activities without the official permission. Therefore, the central government ordered the governorship to follow the relevant regulations for the school. However, the central government advised that Edward would have to apply to the provincial education office to obtain the necessary permission and license if he had wanted to carry out any education and training activities²⁵.

One of the schools opened in Thessaloniki was the Business High School opened by Romania. After Romania gained independence with the Berlin Treaty (1878), she later joined the endeavors to create a social and political influence through education in Thessaloniki. The building of the French Friars School in Thessaloniki was planned to be hired by Romania for the school to be opened. It would be a school like the Mekteb-i Sultani²⁶ in terms of structure. The school's curriculum would be taken from the Italian Business High School. When the application to open the school was considered by the Council of State (ura-yı Devlet), the fact that the Italian School to be taken as an example was considered as an uncertainty in terms of the curriculum since the Italian Business High School was unlicensed. However, the main point of discussion was that the school desired to be opened by Romania aimed at spreading the Wallach language against the proliferation of Bulgarian schools within the Ottoman borders, and the efforts the Serbians to open schools in order to spread their language. As a result of considerations, the Council of State took a decision not to open the school. After the decision of the Council of State, the issue was dealt with by the upper authority (Meclis-i Mahsus). Meclis-i Mahsus draw attention to the problems emphasized in the Council of State, but eventually they decided to approve the establishment of the school. The main motivation in the decision was the effort Romania exerted for the capture of Bulgarian gang members within their borders and the connection between the Romanians and the Wallach living within the Ottoman borders. However, the Parliament also concluded that Muslim students, too, would be enrolled into the school. In this direction, the decision to open the school was released on 2 October 1895.

According to the information given to the Consulate of Romania in Thessaloniki: Romanian Business High School would be opened where the Friar School was located by renting the building. There would be seven classes in the school; approximately ten teachers would be appointed from Romanian and Ottoman nations and two of them would be Muslim. The teachers' annual

²⁴ BOA, *BEO.*,2556-191640 (5 Mart 1321-18 March 1905, 5 Nisan 1321-18 April 1905).

²⁵ BOA, *MF. MKT.*, 814-22 (28 Ağustos 1320-10 September 1904, 14 Eylül 1320-27 September 1904, 19 Eylül 1320-2 October 1904, 21 Teşrîn-i evvel 1320-3 November 1904).

²⁶ Mekteb-i Sultani is an official Ottoman school, opened in 1868 in İstanbul under the example of French High Schools. See for details: V. Engin, *Mekteb-i Sultani*, İstanbul, Galatasaraylılar Derneği, 2003; F. Demirel, *Osmanlı Eğitim Sisteminin Modernleşmesi Sürecinde Hiyerarşi*, «Uludağ Üniversitesi Eğitim Fakültesi Dergisi», vol. 25, n. 2, 2012, p. 514.

expenses would be 3,000 Francs, and the annual cost of the school would be about 60,000 francs. The curriculum and the books to be used would be in accordance with the Italian Business High School. In terms of structure, Mekteb-i Sultani would be taken as an example. Turkish, French and Romanian languages at school would be compulsory²⁷.

As can be understood by the decision, the Business High School, which would be opened by Romania, was planned to use the building of the French Friar School, follow the curriculum of the Italian Business High School, and take the Mekteb-i Sultani as an example of official French schools in terms of the structure. The educational space, curriculum and administrative structure designed for the Romanian Business High School generated a cosmopolitan educational institution that was a mixture of Ottoman, French and Italian. When the official entitlement is put aside, the only indication that the school was opened by Romania was that learning of the Romanian language, and the appointment of Romanian citizens as teachers were compulsory.

Another interesting point in the opening of the Romanian Business High School, according to the detection made in the Council of State, was that the main goal of the opening of the school was the struggle for influence against the Bulgarians and the Serbs in Thessaloniki. The Council of State, therefore, concluded that it was not appropriate to open the school. However, the decision of the Cabinet (Meclis-i Mahsus) was in favor of the opening of the school even though they agreed with the Council of State. The Assembly's decision was a political one aiming at co-operation against the common rival Bulgaria, which tried to gain influence through gang activities in Macedonia.

The main reason for the negative assessment for the opening of the Romanian Business High School in the Council of State was that the demand was basically regarded as an attempt by Romania to have influence over the Wallach. Although the Ottoman State did not want the Wallach community to be a part of the Bulgarians or the Greeks²⁸, they did not want them to be under the influence of Romania either. It is an indication of the fact that the Romanian citizens were not allowed to be teachers in the Wallach schools²⁹. There are many examples demonstrating that Romania intended to exert influence over the Wallach. One of them was concerned with the decision regarding the free admission of three or four children from the most respected Wallach families in the provinces of Thessaloniki, Manastır and Yanya to the Mekteb-i Sultani upon the request of the Romanian Embassy³⁰. Similarly, the Romanian Embassy requested that seven young Ottoman citizens from the Wallach whom Romania regarded as their own people be accepted into the higher education institutions

²⁷ BOA, *MF. MKT.*, 251-6 (20 Eylül 1311-2 October 1895).

²⁸ BOA, *BEO.*, 872/65392 (12 Teşrin-i sâni 1312-24 November 1896); *BEO.*, 2956/221677 (21 Teşrin-i sâni 1322/4 December 1896).

²⁹ BOA, *BEO.*, 2671/200251 (22 Eylül 1321-5 October 1905).

³⁰ BOA, *İ. HUS.*, 103/94 (6 Mart 1319-19 March 1903).

free of charge. The ambassador's request was accepted and recommendations were made to the Thessaloniki provincial authorities for the selection of the students³¹.

The Wallach were in a great dispute with the Greeks in the region and they fought against them in various ways. There were, however, the Wallach that were in cooperation with the Greeks in a limited way³². On the other hand, the Greeks tried to use especially the educational institutions and the churches effectively to assimilate the Wallach³³. The fact that a Wallach student attending a Greek school was attacked by the students of Romanian Business High School (March 1, 1906) was a reflection of Romania's policy towards assimilation. During the attack, the porter of the Business High School helped the students. Moreover, the school porter, who pulled his gun out against the police, was sentenced to three years' penal servitude after trial³⁴.

The Problems Between the Ottoman State Administration and Foreign Schools

In the province of Thessaloniki, some problems were experienced with some of the foreign schools. However, there were no problems with the others. For instance, the Central Government was informed by the Thessaloniki governorship that the only school opened by the British was licensed, and there was no obstacle in terms of its location and in terms of political issues³⁵. Again, it was reported to the Grand Vezir by the Ministry of Education that the Italian School under the auspices of the Consulate of Italy was licensed and contributed to the Province through its teaching activities³⁶. Essentially, one of the oldest schools in Thessaloniki belonged to the Italians. This school was established in 1864 and was named «Mekteb-i Umumi». The principal of this school was Italian. In the curriculum of this school there were also Turkish language lessons³⁷.

One of the problems encountered in the foreign schools in the province was that the schools were opened without a license and the schools which were

³¹ BOA, BEO., 882/66096 (4 Kanun-ı evvel 1312-16 December 1896).

³² B. Demirtaş-Coşkun, *The Vlasbs: a forgotten minority in the Balkans*, London, 2001; M. Ünlü, II, *Abdülhamid Döneminde Ulahlar*, in E. Causevic, N. Moacanin, V. Kursar (edd.), *Perspectives on Ottoman Studies: papers from the 18th Symposium of the International Committee of Pre-Ottoman and Ottoman Studies (CIEPO) at the University of Zagreb 2008*, Berlin, Symposium Book, 2010, pp. 229-244.

³³ A. Arslan, *Makedonya'da Rum-Ulah Çatışması*, «Yakın Dönem Türkiye Araştırmaları», vol. 4, 2003, pp. 17-22.

³⁴ BOA, BEO., 2998/224832 (7 Şubat 1322-20 February 1906).

³⁵ BOA, DH. ŞFR., 296/81 (23 Teşrin-i evvel 1318-5 November 1902).

³⁶ BOA, ŞD. 211/20 (13 Haziran 307-25 June 1891).

³⁷ BOA. MF. MKT., 15/65 (26 Teşrin-i sanî 1289-8 December 1873).

opened continued their activities without a license. A French citizen, Monsieur Tiyeri, applied for a license for a Language School in Thessaloniki. When the curriculum proposed for the school was examined, it was understood that the program was the same as the official curriculum of the schools in France and the application to open the Language School was rejected. It was proposed by the Central Government to change the recommended program. However, curriculum change was not implemented for the school whose license was rejected and the school was opened without a license under the name of the French High School³⁸.

The French High School, which was opened without a license by teacher Monsieur Kun, continued its education activities with 95 students. Though the majority of the students enrolled in the school were Jewish, there were also Muslim and Christian students studying there. At the same time, there was a female section of the school, and 60 Muslim and non-Muslim students also attended this section. It was understood that Monsieur Kun purchased a land to build a school on it; later the Language School whose license was rejected was turned into a school under the name the French High School. Although it was not considered appropriate in the inspectorate report sent by the Ministry of Education to the Council of State³⁹, as a result of the meetings between the Council of State and the Parliament (Meclis-i Mahsûs), the school building was allowed to be opened⁴⁰.

One thing that is noticeable here is the approval of the building permit for a school whose license request was rejected, but which still operated unlicensed with another name. This demonstrates that obtaining a license for education and training and obtaining permission for the school building are independent of each other. It should also be stated here that when application is made for a license to open a school, the building to be used as a school space is also inspected⁴¹. A similar situation was experienced at the Italian school as well. In Thessaloniki, it was intended to build a new school building on the land in the Metropolitan district, with the proceeds to be obtained by the sale of this building together with its land because the building that belonged to the Genoese Dukas Domazori Savoia allocated to the Italian school in the Roğoz district was obsolete. This initiative was responded positively and the approval was obtained. However, since the school was unlicensed, it was stipulated that a license must be obtained for teaching before starting education in the new building⁴².

On the basis of the information mentioned above, it can be stated that the inspection and control was not implemented in the schools which foreigners opened unlicensed and operated illegally. Therefore, the school building, which had to be checked even before it was opened, also went out of inspection. An

³⁸ BOA, *MF. MKT.*, 999/20 (29 Teşrin-i evvel 1323-11 November 1907).

³⁹ BOA, *MF. MKT.*, 971/41 (23 Kanun-i evvel 1322-5 January 1907).

⁴⁰ BOA, *MF. MKT.*, 995/58 (10 Nisan 1323-23 April 1907).

⁴¹ BOA, *BEO.*, 893/66944 (27 Kanûn-ı evvel 1312-8 January 1897).

⁴² BOA, *İ. HR.*, 376/10 (21 Mart 1318-3 April 1902).

unlicensed school could not be imposed sanctions or the school could not be closed. Nevertheless, it is understood that when foreigners applied for a school building license and a license was granted for the school building, sometimes a sanction was imposed on obtaining a license for education and training as well.

Another factor in the inspection of foreign schools in the province of Thessaloniki was the monitoring of their diplomas and graduation ceremonies. Speeches and other events in the ceremonies were monitored and those considered to be negative were reported. An example of these reports was written by Atif, a member of the Thessaloniki Commercial Court, about the ceremony in schools administered by Italians in Thessaloniki in 1890⁴³. In the report primarily, various information was given about the schools. Girls and boys at the level of primary school and secondary school attended these schools. The majority of those who attended the Italian School, where the ceremony was held, were Jewish, Greek, and Turkish students respectively. Following all these details, information about the ceremony were given. The school principal praised Italy in his opening speech. Stating in his speech that Thessaloniki continually grew day by day, the school director emphasized that the spreading the Italian language had the purpose of serving the Thessalonian community for a better future and gave some information about the school. After the speech of the school principal, four students, one of them was Turkish, were allowed to make their speeches. In their speeches, the students talked about their expectations regarding the education and training; they recommended that developing the trade and endeavor for an honorable future would be preferred to everything. Meanwhile, they also mentioned the benefits of learning Italian. Upon the completion of the speeches, the students' diplomas, *tahsinnames* certificates⁴⁴ and awards were granted. On the diplomas and the certificates, together with the Italian coat of arms, there were the names Count Cavour, and Garibaldi (Giuseppe).

Based on the report, it is possible to observe that Atif Bey was present in the school from the very beginning till the end of the ceremony. The same report also reveals the negativity that can be perceived to be against the Ottoman State. For example, this ceremony had officially started before Galib Pasha, the Governor of Thessaloniki, had arrived at the school. In addition, it is possible to see that both Count Cavour and Giuseppe Garibaldi were defined as rebels in the report. However, Count Camillo di Cavour, the Prime Minister of Sardinia (1810-1861) was one of the most influential leaders of the Italian national independence movement against Austria. Also, Giuseppe Garibaldi (1807-1882), who was considered one of Italy's greatest heroes, had fought many times against Austria⁴⁵.

⁴³ BOA, Y. PRK. AZN., 4/72 (13 Teşrin-i sani 306-25 November 1890).

⁴⁴ A printed document given to a student as a prize in Ottoman Modern educational institutions. F. Demirel, *Osmanlı Modern Eğitim Kurumlarında İşlenen Suçlar*, «History Studies», vol. 5, n. 1 (January), 2013, p. 103.

⁴⁵ N. Davies, *Avrupa Tarihi*, translated editor M.A. Kılıçbay, Ankara, İmge Kitabevi, 2006, p. 870.

The structure of the Ottoman State and the independence-oriented uprisings of various non-Muslim nations under Ottoman rule since the beginning of the 19th century was effective in this evaluation of Atif Bey. Particularly the second half of the 19th century was very crucial as the nationalist movements among the non-Muslim population such as the Serbian, the Bulgarian, the Greek, and the Romanian escalated dramatically in that time⁴⁶.

In this report, it can be observed that the all of the views of Atif did not overlap with that of the Ottoman State. Galib Pasha's attendance to the ceremony displays the point that the Ottoman State did not have a negative view against Italian schools.

The Thessaloniki Directorate of Education was not aware of all the diploma and graduation ceremonies organized by the foreign schools in the province. According to the report submitted by the Director of Education, Mehmed Celal Bey, to the Ministry of Education, the graduation ceremony organized for the French Friars School students was not reported to the Directorate. Mehmed Celal Bey reported that the teachers and students of the school made speeches at the ceremony that some of the students were given medals, and even though it was essential to have one of the officials from the Directorate of Education or another officer at those ceremonies, this procedure was not followed. He also stated that medals were given to the students in other foreign institutions as well. In his report, Mehmed Celal Bey asked whether it was appropriate to give medals to some students or not in the foreign schools, and he also asked what actions to take when they did not receive official invitations for the graduation ceremonies (21 July 1894)⁴⁷.

It is understood that although similar ceremonies had been held in the province for many years, and medals were awarded as a part of these ceremonies, the Provincial Directorate of Education did not know how to take action in such situations. In response to the Thessaloniki Directorate of Education, the Ministry of Education detailed the principles to be followed in the award ceremonies to be held in foreign institutions and stressed that these events should be notified to the Directorate immediately before the award ceremony. Furthermore, the Directorate was criticized by the Central Government in their reply and it was stated that such a ceremony could have been known before it was held. It was also stated that it was not possible to penalize these schools because of unapproved ceremonies after they were held even if they were not pertinent to the regulations. The Ministry of Education asked the Directorate of Education in Thessaloniki to be more vigilant and ordered them to notify the Ministry immediately if there were any improper speeches made in those ceremonies. In terms of the medals awarded in the ceremonies, the Ministry could not reach a decision, and

⁴⁶ K.H. Karpat, *Balkanlar'da Osmanlı Mirası ve Milliyetçilik*, translated by R. Boztemur, İstanbul, Timaş, 2012, p. 7.

⁴⁷ BOA, MF. MKT., 226/1 (9 Temmuz 1310-22 July 1894).

it was stated that they would expect a reply regarding this issue from the Prime Ministry (Bab-i Âli)⁴⁸. In fact, the award ceremonies held by the foreign schools were included in the local newspapers. As an example, the award ceremony to be held on Sunday, August 2, 1909 by Franko German School was reported in the «Zaman» newspaper one day before the ceremony date⁴⁹. The newspaper reported that the award ceremony was held on August 3, 1909, and that the audience appreciated the academic development of the students⁵⁰.

Conclusion

Schools of French, Italian, English, German, American and Romanian origin were opened in Thessaloniki. These schools were established at the elementary and secondary education levels. When the population of foreigners living in Thessaloniki is taken into consideration, it is understood that the schools were basically opened to create a political, cultural, economic, and sociological influence.

Foreign schools opened in Thessaloniki directly contributed to the development of various fields in the province such as education, cultural diversity, trade and economy. This contribution was also mentioned in the official correspondences. However, various problems related to schools were experienced as well. The fundamental problem arising from these schools was the struggle for influence (social, commercial, cultural etc.) to be generated through education. The Ottoman State did not want to leave the dominance of influence in Thessaloniki to the foreigners and used the official schools and supervisory mechanisms not to lose the control. Locating the unlicensed schools and forcing them to obtain a license and not allowing unlicensed schools to be opened were among the elements of the control. Foreigners, on the other hand, exerted efforts to maintain their educational activities unsupervised by using their political influence.

On the other hand, the Ottoman State tried to monitor the various activities at the foreign schools in Thessaloniki carefully in order to prevent the spread of the separatist movements in the Ottoman Empire due to the political atmosphere in Europe, where independence movements had become the most significant reality of the 19th century. The activities in the foreign schools which could be observed were reported to Istanbul. The central administration in line with the received reports issued various warnings to the provincial administration of Thessaloniki.

⁴⁸ BOA, MF. MKT., 226/1 (3 Eylül 1310-16 September 1894).

⁴⁹ «Zaman», n. 264, 1 August 1909, p. 3.

⁵⁰ «Zaman», n. 266, 3 August 1909, p. 3.

A Fairy tale (r)evolution: the value and the critical reading of fairy tales in the contemporary educational context

Dijana Vučković
Teacher Training Department
Faculty of Philosophy
University of Montenegro-Nikšić
(Montenegro)
dijanav@ac.me

ABSTRACT: In this paper we present a diachronic overview of a classical fairy tale, i.e. its creative and receptive (r)evolution, which is the basis on which we determine the educational value of this literary type. In different epochs a fairy tale was the source of controversy and it is also the case today-some people praise it, pointing out that it gives hope, while others connect it with conservative attitudes and values. Most often, a fairy tale in education is treated as a story that simply distinguishes good from evil, but the structure of many fairy tales cannot be reduced to the black and white morality. This is especially true if we interpret a fairy tale at deeper significance levels. Instead of using a fairy tale in education to serve as a moral lesson, it would be more meaningful to interpret it as a story that calls for critical reading, to explore its numerous adaptations and evolution. A fairy tale is increasingly present, so the evolution of this genre turns into a revolution. In order for children to better understand a fairy tale message and its complex artistic nature, it is necessary to read it in the classroom with a problem-based and research-based critical approach. Such an approach to a fairy tale is suggested in this text within the framework of the reception theory.

EET/TEE KEYWORDS: Adaptations; Children's literature; Critical reading; Evolution of a genre; Fairy tale in education; Fairy tale reception; XIXth-XXIst Centuries.

Introduction

After many centuries of existence and accumulation of countless connotations, a fairy tale was invented in children's literature during the 19th century and, in

the opinion of some researchers, that was made uncritically¹. Before the formal joining to the literature for children, a fairy tale had been told and written by adults for adults and that has to be the part of perspective of its contemporary interpretation. This fact is followed by the level of possible understanding of a fairy tale. Most fairy tales have wider and deeper meanings that children of preschool and younger elementary school age-which is the period when fairy tales get the most intense acceptance-cannot understand. «Double» reading-from the angle of the child and from the angle of the adult-is necessary for every fairy tale today and in support of the cross-generation relevance of this type². A fairy tale is a representative type of oral literature, so it has experienced the adaptation in writing. These qualities are a prerequisite for understanding the diachronic significance and meaning of this kind. They also suggest the literary-historical necessity of adapting a fairy tale: 1. to children's audiences and 2. standard written languages. These are initial and very important but not the only adaptations the fairy tale has experienced and they show that stunning adaptability is inherent in its discourse³. A fairy tale is strongly reflected in the metanarrative⁴ of culture from which it came. Since it is saturated with metanarrative, it is adaptable, changes with it and transmits its messages.

Nowadays, a fairy tale is extremely inspirational in various arts, it is transposed from media to media, recorded as a subtext in composite structure, and sometimes several classic fairy tales interfere with the unified narrative. The significance and meaning of a fairy tale grows with these procedures. What is the main reason for a fairy tale to be so creative and receptive? The new millennium has been characterized by technical-technological advances, a global connectivity and an extremely fast information flow. At the same time, with these benefits, everyday life becomes more complicated, society imposes ever growing demands in the face of an individual from the earliest age. Jack Zipes is convincingly opposing the fantasy, as an artistic genre, to everyday life and points out that enjoying fantasy artworks is a way of smoothing an incredibly challenging reality. Zipes describes the position of a man in modern society «we are all being surveyed, marked, and checked through complex technology in the hands of insensitive, ignorant, and puppet bureaucrats and police without our realizing it and without protection»⁵. Within such a reality «we turn to the Bible and fairy tales and all kinds of fantastic artworks for diversion, what the French

¹ M. Nikolajeva, *Reading for Learning-Cognitive approaches to children's literature*, Amsterdam, Philadelphia, John Benjamins Publishing Company, 2014, p. 182.

² I. Calvino, *Six Memos for the Next Millennium*, translated by P. Creagh, London, Vintage, 1996.

³ D. Cavallaro, *The Fairy Tale and Anime: Traditional Themes, Images and Symbols at Play on Screen*, London, McFarland, 2011, p. 5.

⁴ J. Stephens, R. McCallum, *Retelling Stories, Framing Culture. Traditional Story and Metanarratives in Children's Literature*, New York, London, Garland Publishing Inc., 1998.

⁵ J. Zipes, *Why Fantasy Matters Too Much*, «CLCWeb: Comparative Literature and Culture», vol. 10, n. 4, 2008, p. 9, <<http://dx.doi.org/10.7771/1481-4374.1392>> (last access: 30.09.2017).

call divertissement, to take our minds off reality, to enjoy a moment of calm estrangement or titillation, to appreciate the extraordinary in the ordinary, to reassess our values and alternatives to determining social forces»⁶.

In modern society, there is a social anomie, identified by Durkheim⁷ in the middle of the last century, and then by other sociologists⁸. The phenomenon of the anomie describes the situation of social instability, i.e. the lack of a coherent value system, which is the cause of frequent individual disintegration. An individual in such conditions feels insecurity, anxiety, and meaninglessness⁹. The anomie is also reflected in the fact that an individual often has no clear social judgment for some of his actions, he/she is not sure of whether the same behavior should be highly rewarded or severely punished. Ultimately, this means that modern societies do not confine good from evil. Such a situation, of course, especially affects children and young people, and if «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»¹⁰. Since reality does not provide a safe and firm demarcation of good and evil, to children, young people, and often adults, a fairy tale offers a world where right from the beginning to the end of the story, we know what is good and what is bad. In fairy tales there is not much re-examination of rewards and punishments, they are awarded for merit, so the rewards come without a lot of words and one is punished without a grievous conscience. Many fairy tale characters' actions can be critically interpreted and questioned in the light of more refined ethical principles (which many critics do), but this does not have a major impact on the reading audience. A child needs the difference between good and evil, it is important for him/her to know that there are rewards and punishments, so he/she likes to read fairy tales and all the genre that are related to it. In this sense, in the reference framework of contemporary society, receptive and creative are highly quoted forms and types of fantasy, so the interpretation of a fairy tale in teaching should be matched with a contemporary teaching methodology that emphasizes critical thinking and comprehensively understands the genre of a fairy tale and numerous metamorphoses through which this literary type has passed.

This literary type is a source of controversy, starting from the unproved theories of its creation, through its genre characteristics and interpretations¹¹,

⁶ *Ibid.*, p. 2.

⁷ E. Durkheim, *Suicide: a Study in Sociology*, Glencoe, Illinois, The Free Press, 1951.

⁸ M. Orru, *Anomie: History and Meaning*, London, George Allen & Unwin, 1987.

⁹ Z. Šram, *Anomija, depresivnost i antizapadna orijentacija* [Anomy, depression and anti-west orientation], «Revija za sociologiju», vol. 38, nn. 3-4, 2007, pp. 103-118 (in Croatian).

¹⁰ Lj. Pajović-Dujović, D. Vučković, *Reincarnation of the Vampire Character in Literature for Children and Youth in the Twilight Series by Stephenie Meyer*, «History of Education and Children's Literature», vol. 12, n. 2, pp. 301-322.

¹¹ J. Zipes (ed.), *The Oxford Companion of Fairy Tales*, Oxford, Oxford University Press, 2000.

and ending with the role of a fairy tale in education. Many of the controversies are still valid today, after numerous critical debates.

Thanks to the strong distinction of its fiction from the real experience, a fairy tale can be interpreted at many levels of connotations, even without them in its denotative meaning. If we look at the «superficial», a fairy tale is so wondrous, i.e. it's far from the real world. The «surface» of a fairy tale has a virtually incorrect image, and only by immersion in its significance layers we realize that the depth to which we are led is exceptional, even optically deceptive. Children respond well to the «surface» of the fairy tale, while for adults the denotation of a fairy tale is childish. Hence, in the adult age, i.e. when we are ready to understand the inner layers, we rarely return to fairy tales—we are rejected by its «childish surface». A fairy tale is a layered narrative discourse that has «settled down» for centuries, showing various «faces» to individual readers, but also to times and epochs. A special value of this kind is that with allegories, metaphors and/or metonyms and symbol presents reality impressively. Bettelheim compared a fairy tale to the pool of water¹² and thus pointed to its layering and depth. This comparison would suggest that what, as interpreters, teachers or readers we see in fairy tales will depend on our fixed point and the optics we use, i.e. from the «beam of light» that we direct on it. If we use a psychoanalytic approach of a fairy tale, or a feminist or some third «light beam», we are in danger of losing the wealth of meaning from our sight. This is happening in most theoretical interpretations of fairy tales, which is strongly reflected in the reading of a fairy tale in the educational process.

In this paper, we give a diachronic overview of the development of European classical fairy tale with emphasis on important issues of its adaptation from one form to another. We also deal with the genre qualities of a fairy tale, considering their educational value and the way of reception. Since the fairy tale has shown chameleon nature—not once during a long life—we will examine part of her adaptations to other art forms and part of motifs borrowed to new literary texts. As we shall see, the «seed» of a fairy tale can be found everywhere, and this fact is imposed as one of the factors that fairy (should) constitutes as a component of educational programs. In general, we will search for the answer to the question: What is the contemporary educational value of a fairy tale? We will also present some ways for critical research-based and problem-based reading of fairy tales in contemporary teaching.

¹² B. Bettelheim, *The Uses of Enchantment: The Meaning and Importance of Fairy Tales* (1976), London, Penguin, 1991.

1. *Genre determinants and theoretical approaches to a fairy tale*

The primal form of a fairy tale existed from the first centuries after Christ, and Anderson's research confirmed the pre-Christian origin of motifs and the connection of a fairy tale with Greek and Roman mythology¹³. It has been proven that we can find a fairy tale in earlier civilizations, like the Egyptian¹⁴. Tzvetan Todorov is referring to the genre determinants and boundaries of a fairy tale, the character of its marvelous world and its distinction from related fantastic worlds. *The marvelous* is typical for folk and fairy tales, although it is also a feature of the myth. A fairy tale differs from the myth by the fact that marvelous in it is deritualized and desacralized. This feature of the event explains that the reader accepts the unusual circumstances and laws of the fictional world as another reality. The mixing of the laws of the reader's reality and the virtual world of fairy tales is not present. The reader does not wonder how magic works; he accepts it as a fairy tale and does not seek out the explanation of the nature of the event¹⁵. Therefore the transposition of a fairy tale directly into the level of real experience seems quite unnecessary and impractical when we talk about the reception of a fairy tale in an early childhood. Todorov's definition of *the marvelous* also explained the act of reception-the reader is convinced from the beginning to the end that the fairy tale is happening in the «locked world». The «keys» are usually-starting *once upon a time*, and finishing *happily ever after*. Interfering an adult as a reader or an interpreter of a fairy tale, if inefficiently performed, can cause an interlacing with the real and fictional in the child's image of the world, which would provoke a fear in the children. Actual readers and interpreters¹⁶ need to be careful about the choice of a fairy tale, and then the way it is presented to the children.

Fairy tales recorded periods of popularity but also those phases when they were rejected. The ban of fairy tales took place in the age of contra revolution in the 17th century. By the end of the same era, a fairy tale will be considered as literary refreshment by realizing the aesthetic distance in a slightly petrified horizon of the expectations of the public at this time, the public loyal to the cult of heroism and classical tragic. Periods of pre-romanticism and romanticism popularized a fairy tale. Fairy tales of various nations were collected, and the highest social classes were fascinated by them¹⁷. Fairy tales also had phases in modern history, in which they didn't have any literary and educational value.

¹³ G. Anderson, *Fairy Tale in the Ancient World*, London, Routledge, 2000.

¹⁴ N. Vuković, *Uvod u književnost za djecu i omladinu* [Introduction to Literature for Children and Youth], Podgorica, Unireks, 1996 (in Serbian).

¹⁵ T. Todorov, *The Fantastic: A Structural Approach to a Literary Genre*, translated by R. Howard, Cleveland, Case Western Reserve University Press, 1973.

¹⁶ S. Chatman, *Story and Discourse: Narrative Structure in Fiction and Film*, Ithaca, Cornell University Press, 1978, pp. 151-161.

¹⁷ Zipes, *The Oxford Companion of Fairy Tales*, cit.

The beginning of the twentieth century was like that, marked by the aspirations for pragmatism in education and scientific view of the world. Those periods in the development of civilization that characterize a strictly rational spirit and endless faith in the power of science were disenchanted by the metaphorical transformations of reality, so in this literary type they did not see a reading suitable for education. Human civilization recorded such phases, as well as those completely opposite, which, with all means of interpretation, swept into deeper layers of fairy tales by finding them as a very important life lessons. So, a fairy tale is interpreted from the angle of approaches «that are Jungian, Marxist, sociopolitical, dialectical, historical, text-historical, feminist, gender-related, mythological, and economic, with both affirmative and critical assessments»¹⁸.

The study of a fairy tale begins in the late 18th and early 19th centuries, a period that coincides with the publication of many collections of folk fairy tales and the gradual establishment of an original (author's) fairy tale¹⁹. The origin of a fairy tale and its motifs were the key elements of research until the structural approach of Vladimir Propp. This approach was not used in teaching, so we will describe it in more details to indicate its possible role in teaching interpretation of a fairy tale. Propp's morphology describes a folk fairy tale, so its value is relative to the author's fairy tale. In fact, access can be applied to an author's fairy tales, with structure showing certain deviations from a fairy tale described by Propp. The fundamental thesis of this structural expert is that fairy tale motifs are a variable category, and only stable categories should be studied. These are the functions of actors of action, and there are 31 in total. They are, according to Propp's morphology, invariant, as they are constant in their order²⁰. Propp has established that Russian folk tales from Afanas'ev's collection have incredible repeatability in terms of the actions that the characters make. From Propp's analysis, it is obvious that folk fairy tales of various nations contain many similar / identical elements, so it is logical that the structure described relates to a folk fairy tale in general, and due to the instability of the oral form of the folk fairy tale, expected deviations from the basic aspect are possible. For all functions, Propp provides a brief description, a provision (abbreviated function name), and an alphabetical tag. Through a rather complex analysis, Propp found that a folk fairy tale scheme is developed through the following functions: absentation (β), interdiction (γ), violation (δ), reconnaissance (ϵ), delivery (ζ), trickery (η), complicity (θ), villainy (A) or lack (a), mediation (B), beginning counteraction (C), departure (\uparrow), first function of the donor (D), the hero's reaction (E), provision of a magical agent (F), guidance

¹⁸ R.G. Murphy, *The Owl, the Raven & the Dove. The Religious Meaning of the Grimms' Magic Fairy Tales*, Oxford, Oxford University Press, 2000, p. VII.

¹⁹ J. Zipes, *Why Fairy Tales Stick-The Evolution and Relevance of a Genre*, New York, London, Routledge, 2006, p. 42.

²⁰ V. Propp, *Morphology of the Folktale* (1928), translated by L. Scott, Austin, University of Texas Press, 1968.

(G), struggle (H), branding (I), victory (J), liquidation of lack (K), return (↓), pursuit (Pr), rescue (Rs), unrecognized arrival (o), unfounded claims (L), difficult task (M), solution (N), recognition (Q), exposure (Ex), transfiguration (T), punishment (U), wedding (W)²¹. Propp envisages different subtypes for almost all functions, which are described in the *Morphology of a Fairy Tale* and given special notes that come with the addition of an index to the basic function tag. According to Propp's opinion, the whole action of a folk fairy tale develops through the scope of the so-called dramatis personae, i.e. characters of one fairy tale. Propp distinguishes between seven scopes: villain, donor, helper, princess (a sought-for person) and her father, hero and false hero. The main hero can be a hero-seeker or hero-victim, while a fairy tale always follows only one of them. Various studies have shown that Propp's morphology also applies to fairy tales of other nations: North American Indians²², Arabs²³, Turks²⁴. The Propp's morphology was applied beyond a folk fairy tale, so it is shown that its approach can also help in determining the structure of the author's fairy tale (whereby there will be deviations from the basic scheme, which allows the identification of aesthetic distance), but also more complex fantasy narratives, and even the fantasy novels and fantasy series²⁵. In some situations, assimilations take place (the process can be interpreted as the realization of different functions) or one process combines several functions. The fundamental factor that makes it possible to distinguish and precisely mark the function are its consequences. Therefore, every process of any hero (function) causes consequences, and based on them determines the morphological value and function of the mark.

All critical approaches gave valuable insights about this literary type, but none is universal or allows polysemic understanding of the layers of fairy tales. In general, approaches are exclusive and radically (do not) accept a fairy tale, except, perhaps, Propp's approach whose value is neutral and he's trying to determine the fairy tale's structure and does not deal with the evaluation of its inner values. Still, the elements of a fairy tale's morphology, even though Propp describes them neutrally, can be a subject to critical assessments-e.g marriage as the only happy ending, princess as abducted, a sought-for person, etc.

Experts in folklore and anthropologists see in these stories a reflection of ancient cultures and rituals, while researchers of the sociological orientation

²¹ *Ibid.*, pp. 25-65.

²² A. Dundes, *The Morphology of North American Indian Folktales*, Helsinki, Suomalainen Tiedekatemia, 1964.

²³ B. Connelly, H. Massey, *Epic Splitting: An Arab Folk Gloss on the Meaning of the Hero Pattern*, «Oral Tradition», vol. 4, nn. 1-2, 1989, pp. 101-124.

²⁴ U. Günay, *Application of Propp's Morphological Analysis to Turkish Folktales*, «Hacettepe Üniversitesi Edebiyat Fakültesi Dergisi», vol. 11, nn. 1-2, 1994, pp. 1-6.

²⁵ J. Hunter, *Folk Tale Structure as the Key to the Success of the Harry Potter Series. A Brand of Fictional Magic: Reading Harry Potter as Literature*, University of St. Andrews, Scotland, 17 May 2012.

find images of social life²⁶. The function of this type is in initiation ceremonies for both genders²⁷. Gender-related criticism and feminist approach in fairy tales read the gender-unacceptable perspectives²⁸. Women's roles are reduced to the level of the object, and they are equally stereotypical as male's roles, the so-called heroic roles. This critical approach in fairy tales only sees retrograde formulas of a patriarchal society that violently builds the masculine subjective position and supremacy and feminine object and inferior position, i.e. fairy tales point out «the negative side of femininity for girls (fragility, timidity, obsession with appearance and with domesticity), and the negative side of masculinity for boys (aggression, insensitivity, rudeness, and a refusal to be helpful)»²⁹. Generally, there are many of those who see fairy tales as conservative values (in class, racial, gender, etc.)³⁰ and suspicious morality³¹, stories in which the female role is passive, so girls are not even literary characters but symbols that are awarded to male individuals, i.e. «in some stories the hero's reward is not a golden object but a golden bride who is invariably beautiful and often a queen or princess»³². A negative image of a female gender is also created through rivals in fairytale narratives³³. These are antagonistic relations between Cinderella and her half-siblings, Snow White and her stepmother, Beauty and her sisters, etc. The very ideal of feminine beauty read from a fairy tale causes negative reactions among the interpreters³⁴. According to these and such aspects, with fairy tales we «keep the old order» in society and disables human progress and, in particular, women's revelation. It is emphasized that fairy tale is set up as an imperative that keeps the «harmonious existence of the family and society»³⁵ in a very traditional outfit, and fairy tales have been reproduced «by a cultural industry that favors patriarchal and reactionary notions of gender, ethnicity, behavior, and social class»³⁶. Many authors point to the various supremacy and colonization that are connoted by a fairy tale³⁷.

²⁶ Vuković, *Uvod u književnost za djecu i omladinu*, cit.

²⁷ J. Campbell, *The Power of Myth*, New York, Doubleday, 1988.

²⁸ M. Hourihan, *Deconstructing the Hero-Literary Theory and Children's Literature*, London, New York, Routledge, 1997.

²⁹ B. Davies, *Frogs and Snails and Feminist Tales: Preschool Children and Gender*, Cresskill, New Jersey, Hampton Press, 2003, p. XI.

³⁰ Zipes, *Why Fairy Tales Stick*, cit.

³¹ Nikolajeva, *Reading for Learning*, cit.

³² Hourihan, *Deconstructing the Hero*, cit., p. 51.

³³ M.J. Botelho, M.K. Rudman, *Critical Multicultural Analysis of Children's Literature: Mirrors, Windows, and Doors*, New York, London, Routledge, 2009, pp. 52-53.

³⁴ Hourihan, *Deconstructing the Hero*, cit.

³⁵ L.C. Seifert, *Fairy Tales, Sexuality, and Gender in France 1690-1715*, New York, Cambridge University Press, 1996, p. 109.

³⁶ Zipes, *Why Fairy Tales Stick*, cit., p. 2.

³⁷ C. Sarland, *Critical Tradition and Ideological Positioning*, in P. Hunt (ed.), *International Companion Encyclopedia of Children's Literature*, 2nd ed., London, New York, Routledge, 2004, vol. 1, pp. 56-75.

For these points of view, there are many examples and a great number of fairy tales that fit into conservative patterns and which replicate existing social relationships. Society supports and reproduces the art that gives it support and makes it sustainable. Even if fairy tales exclusively paint previously presented forms, it must be critically read by children and young people during education. Only in this way, young readers will understand many negative values that society replicates through this story. But it is realistic to assume that the fairy tale was not held through history solely to establish the attitudes of patriarchal morality. It is more likely that in a fairy tale, in the ancient times, two key points were split-individually (important for the individual) and socially (important for the collective). The relationship between the collective and the individual often indicates the struggle of these two principles. Thus, it is possible to consider the fairy tale as a mechanism of the socio-cultural theory of Vygotsky, it sees social practice as a support for individual allomorphic development, for mental ontogenesis³⁸. A fairy tale is a type of a powerful provocateur of the *Zone of Proximal Development* (ZPD), which can explain the attractiveness of many motifs (getting married) in fairy tales for a preschool child or for a child of a younger school age.

In addition, there are those fairy tales that do not construct an inferior female role³⁹, as they do not depict other stereotypes. Let's say, Andersen's *The Little Sea Maid* shows the female gender as a self-confident and with powerful spirit⁴⁰. The main heroine was given the opportunity to acquire an immortal soul without any common preconditions (like marriage). She expresses the atypical desires for her gender (female), her kind (siren), and society (from the bottom of the sea) where she belongs to. Some of her desires will not be realized, but some will, so the heroine will get the right to the immortal soul and will rise up vertically upwards-from the bottom (literally, from the deepest sea bottom) to the top (in the air)⁴¹. Here is presented a pronounced vertical organization of space, which unambiguously marks the rise of a heroine. The mermaid moves through the narration from the lower world (deep water and darkness) into the upper (air and light). This story has strong religious messages, and it shows an image of the metanarrative age and culture in which it was created. Andersen has more texts in which the role of female characters is not subordinated to male «heroes». Fighter Gerda also takes on a typical «male heroic quest»-a trip from home to unknown lands in search of Kay. In fairytale *The Snow Queen*, a girl and a boy have replaced traditional birth patterns-he is small and helpless,

³⁸ L.S. Vygotsky, *Thought and Language*, translated by A. Kozulin, Cambridge MA, London, The MIT Press, 2012.

³⁹ R. Bendix, *Seashell Bra and Happy End-Disney's transformations of The Little Mermaid*, «Fabula», vol. 34, nn. 3-4, 1993, pp. 280-290.

⁴⁰ A.W. Hastings, *Moral Simplification in Disney's The Little Mermaid*, «The Lion and the Unicorn», vol. 17, n. 1, 1993, pp. 83-92.

⁴¹ H.C. Andersen, *Complete Fairy Tales*, London, Wordsworth, 2006.

enchanted with the glass of evil and manipulated. The girl, on the contrary, is aware, determined and brave. A collection of Arabian fairy tales *Stories of 1001 nights* is infiltrated into the western canon and in the main plotline is the skill of female narrative, and the courage, the curiosity and, ultimately, its excellent knowledge of psychology of tales and storytelling. Scheherazada is a narrator who uses the technique of «cut», which as very important in literature science, emphasizes the literary reception⁴² theory and/or reader-response criticism⁴³.

Researchers are also arguing on the moral principles of fairy tales (they dominated the favor of the fairy tale in education!), considering that it does not originate in heroes, but somewhere outside of them, while the characters just follow it, without their own determination and without their own willing decision. In this respect, «paradoxically, fairy tales with their seemingly explicit morals are highly problematic»⁴⁴, which author illustrates with many examples in which characters cheat, hide, lie, steal, turn out to be someone else etc. Some fairy-tales fit into the previous statement, but there are also those who are moral. Let's say, Pushkin used a fairy tale to criticize moral and other standards of that time, and every-day society. Golden fish in the text of *The tale of the fisherman and the fish* has sent important moral lessons to the greedy fisherman's wife, but also to her inferior husband, to the man without will and determination. There are exceptional moral messages from some Oscar Wilde's fairies. *The Happy Prince* shows the *post festum* helplessness of someone who was all his life blind to other people, their lives and suffering. Paradoxically, the prince only shows the most humble compassion as an inanimate statue. The absurd narrative image of revived statue sends strong messages.

Negative thinking about fairy tales is also provided by pedagogues and psychologists who are rightly questioning what effects they may have on children's psyche, a fairy tale bloody and other severe scenes, such as: *Bluebeard*, devouring of the grandmother and Little Red Riding Hood by wolf, tear of the heel and fingers by half-siblings in *Cinderella*, etc. Already mentioned and similar scenes, by themselves and written without any extra emotional tonality read to a child, will almost certainly not hurt a child's psyche if we consider *the marvelous* reception to Todorov's determination⁴⁵. The negative effect of such scenes is possible, but it is more often caused by who tells a fairy tale, who reads it and interprets-to its actual reader⁴⁶. In addition, we can always and have to choose which fairy tales to read to the youngest. *Bluebeard* is not a fairy tale

⁴² H.R. Jauss, *Aesthetic Experience and Literary Hermeneutics*, translated by M. Shaw, Minneapolis, University of Minnesota Press, 1982.

⁴³ W. Iser, *The Implied Reader: Patterns of Communication in Prose Fiction from Bunyan to Beckett*, Baltimore, Johns Hopkins University Press, 1974.

⁴⁴ Nikolajeva, *Reading for Learning*, cit., p. 183.

⁴⁵ Todorov, *The Fantastic: A Structural Approach to a Literary Genre*, cit.

⁴⁶ For discussion about narrative communication see Chatman, *Story and Discourse*, cit.

for preschoolers and primary school students, but its connotations could be important for adolescents.

From the psychological and pedagogical point of view, belief in magic is by itself problematic. In order to argue about «belief in magic», it is necessary to bear in mind that the time in which the category of a miraculous flowered in Europe (during the Middle Ages) is characterized by the fact that most people from different social classes believed in magic, so a fairy tale absorbed that metanarrative. From some real beliefs to inexplicable phenomena, sometimes literary characters emerged, and a striking example is one of a vampire, a figure who became a literary hero⁴⁷ because of the real fear of the dead. In addition, «magic may be natural, not supernatural, and the languages of science consequently profoundly affect visions of metamorphic change»⁴⁸. The beginning of the 21st century was marked by the aggressive technical-technological upswing, as well as by the flourishing of fairy tales and other fantastic literature, which is an excellent confirmation of Arthur Clarke's third law: «Any sufficiently advanced technology is indistinguishable from magic». The child is always «adapted to his time and to his environment»⁴⁹ and the contemporary popularity of fantasies among children and young people suggests a close link between technology's success and fantastic literary magic. It would be expected that with the increased level of knowledge there would be a decrease in the need for new fictional worlds in which magic forms legality. Still, fantasy artwork is spreading the boundaries of the mind toward the new, and through fantasy, reality transposes into virtual dimensions that provide insights into reality. The reader has the need for fantasy-it is adaptable, allows a departure from reality and a better look at it, gives hope that a happy ending is possible, etc. Hence it is almost conceivable that a civilization that is so strongly devoted to technical and technological advancement fantasy artwork is necessary as an elixir to the human essence, as a defense against the real causality and as a salvation from everyday life.

Equality (in interpretation of a fairy tale) is also present in the psychoanalytic approach, whereby the one who talked the most about it was Bettelheim, from Freud's starting point on the symbolization of sexual instinct. Bettelheim's interpretation of fairy tales has come to the acceptance among researchers, mainly because we are looking at the fairy tale as a story with an abundance of connotations for which there are real correlations that the child faces during development. He observes a fairy tale connotation through the interpretation of

⁴⁷ D. Vučković, Lj. Pajović-Dujović, *Vampirski ples sa smrću i njegove metamorfoze u literaturi* [*Vampiric Danse Macabre and Its Literary Metamorphosis*], «Književna smotra», vol. 48, n. 182 (4), 2016, pp. 3-16 (in Croatian).

⁴⁸ M. Warner, *Fantastic Metamorphoses, Other Worlds. Ways of Telling the Self*, Oxford, Oxford University Press, 2007, p. 18.

⁴⁹ M. Montessori, *The Absorbent Mind*, Madras, India, The Theosophical Publishing House, 1949, p. 54.

early childhood complexes, and from fairy tales he reads many sexual fantasies, therefor his focus is on the affective and symbolic significance of fairy tales. Bettelheim is affectionate with fairies and considers it essentially significant-as a therapeutic tool that helps children overcome anxiety and fears⁵⁰. The complicated construction of fairy tales on only one group of motifs-which was done in this approach-had to be subject to objections, and there were so many⁵¹. And Jung's collectively unconsciously and archetypes served as the basis of interpretation. However, fairy tales are too rich with all those years, adaptations and meanings to be lighten by one critical approach. Their nature scrambles from every single theoretical «beam of light».

Critical approaches that can find gender, class, racial in fairy tales etc. undesirable patterns, traditionalist order and conservative values, manifestations of sexual fantasy, too much violence, bad moral messages, etc., have adequate evidence. Examples well illustrate critical tones and are mostly undisputable. But in the spirit of such aspects, the educational values of fairy tales are disputable, just like the ways and levels of its possible school interpretation. We have already shown that for each theoretical statement and for each example, its opposite may be found. That's why it's very important for a fairy tale not to be observed with just one optic⁵². Italo Calvino, for example, insists on the preservation of the particular color of each fairy tale, which is the approach that starts from the text and which «keeps» the text. He emphasizes the necessity of cultural contextualization of fairy tales, which is the way to its observation as part of the metanarrative of culture and the era in which it emerged, «the objects of empirical experience, the implements available to a given culture, the plants and animals of a particular flora and fauna, can provide data which would otherwise elude us regarding the value which that particular culture ascribes to them»⁵³.

Number of those who praise a fairy tale is pretty much the same if not much higher than those who challenge its value. Researchers point out the imagination of fairy tales, the hope they provide and the inexhaustible possibilities of figurative language. This is also strongly supported by the fact that many reputable writers also wrote fairy tales⁵⁴. Interest in fairy tales in critical circles has always been strong. Stories that motivate creators for a long time and inspire critics have importance and value.

⁵⁰ Bettelheim, *The Uses of Enchantment*, cit.

⁵¹ J. Zipes, *Breaking the Magic Spell: Radical Theories of Folk and Fairy Tales*, London, Heinemann, 1979; M. Tatar, *Off with Their Heads! Fairy Tales and the Culture of Childhood*, Princeton, Princeton University Press, 1992; H. Bosmajian, *Psychoanalytical criticism*, in Hunt (ed.), *International Companion Encyclopedia of Children's Literature*, cit., pp. 129-139.

⁵² Zipes, *Breaking the Magic Spell*, cit.

⁵³ I. Calvino, *Sulla Fiaba*, Turin, Giulio Einaudi, 1988, p. 113; according to Cavallaro, *The Fairy Tale and Anime*, cit., p. 10.

⁵⁴ J. Zipes (ed.), *Spells of Enchantment-The Wondrous Fairy Tales of Western Culture*, New York, Viking Penguin, 1991.

The enthusiasm for fairy tales as a literary kind is inspired by the observer's point of view, who in the fairy tale sees victory over the poor living conditions, over the forces of nature, and thus over death, which could be interpreted by many ends of fairy tales which are not in the function of the end⁵⁵-these are new beginnings in the form of weddings, crowning and other advances, etc. All these «final beginnings» are some kind of revitalization and in them, the metaphorically speaking, is the «seed» of the revolution. The popularity of fairy tales is probably the most deeply connected with the fact that those «wish-fulfillment fantasies in which characters get what they want and are happy with it»⁵⁶ and they are written and told «to provide hope in a world seemingly in the brink of catastrophe»⁵⁷. Fairy offers a kind of optimism, which could sometimes be called naive, but even such optimism in some situations supports a person. Fairy tales are commonly seen as «generally brief narratives in simple language that detail a reversal of fortune, often with a rags-to-riches plot that culminates in a wedding. Magical creatures regularly assist earthly heroes and heroines achieve happiness»⁵⁸. Although this definition excludes a large number of actual texts, i.e. does not give a complete genre description of a fairy tale, it is general and under such a description, a fairy tale is presented with the pleasure to a wide population.

2. *The development of fairy tales up to the 20th century. Written form adaptation*

Fairy tale is a story with a long existence, so it is impossible to determine when and where it was created. It is difficult to find out exactly what its ancient purpose was⁵⁹. Since in this text we present the so-called fairy tales of Western civilizations (under which the European origins of this species are dominant), it is important to note that the Eastern relation to the magical is different from the Western⁶⁰. This is linked to a metanarrative which frames culture and civilization. Metanarrative reflects on the world of the community, and each specific narrative in it is contextual, i.e. «a metanarrative is a global or totalizing schema which orders and explains knowledge and experience»⁶¹. A

⁵⁵ Zipes, *Why Fairy Tales Stick*, cit.

⁵⁶ P. Nodelman, *The Hidden Adult-Defining Children's Literature*, Baltimore, The Johns Hopkins University Press, 2008, p. 81.

⁵⁷ Zipes, *Spells of Enchantment*, cit., p. XI.

⁵⁸ R.B. Bottigheimer, *Fairy tales and folk tales*, in Hunt (ed.), *International Companion Encyclopedia of Children's Literature*, cit., p. 261.

⁵⁹ Zipes, *The Oxford Companion of Fairy Tales*, cit.

⁶⁰ D. Cavallaro, *Magic as Metaphor in Anime: A Critical Study*, Jefferson, London, McFarland, 2010.

⁶¹ Stephens, McCallum, *Retelling Stories, Framing Culture*, cit., p. 6.

fairy tale in Europe has had its acceptance and rejection phenomena, while its popularity with Oriental population has always been unquestionable.

We will briefly describe the development of fairy tales in Europe without the intention to mention any details since this part is well-known in science⁶². In Jack Zipes's opinion, cradle of classic European fairy tales is Italy. Reasons for a fairy tale appearance at the Italian ground are in the geographical position and socio-cultural significance of Italy in the period of Humanism and the Renaissance, and even earlier⁶³. As an area that was at the crossroads of the Mediterranean routes and in which the interferences of cultures took place, the Italian ground was predestined to breed the first fairy tale writers⁶⁴. This is in addition to the extraordinary richness of Italian folk fairy tales⁶⁵ and the heritage of Roman mythology. From Italy, the «waves» of fairy tale transmitted to neighboring France, and to Germany and other countries⁶⁶. A fairy tale has already existed in all European population as an oral type, and this «waves» of a fairy tale concerns its translation in the written form and the first author's works. At the beginning of the written fairy tale's trajectory, Straparola published *Le piacevoli Notti* (1550-1553), while Basile's *Lo cunto de li cunti* was released almost a century later (1634-1636). Charles Perrault (1628-1703) has a great credit for establishing a fairy tale as a literary kind. His favorite fairy tale, *The Sleeping Beauty*, was published in 1696, so his first collection was released in the following year. He popularized a fairy tale in aristocratic circles, which led to its growing popularity. Perrault's fairy tales had final moral lessons⁶⁷. The ending was so effective, so the fairy tale in France during and after Perrault gained great popularity among the educators. Among them there were those who overwhelmed the morality of fairy tales. At the same time, with Perrault and after him, a fairy tale was expressed by Mme d'Aulnoy, Mme de Murat, Mme de Villeneuve, Mme de Beaumont etc. The use of the name *fairy tale* or the *conte de fées*⁶⁸ is connected to Mme d' Aulnoy. Many French ladies (most often governess or teachers) began to write fairy tales by seeing in them a powerful educational asset. There are many justified critical tones about their creativity, and it is important not to forget- by using a fairy tale, they have popularized education in one period⁶⁹.

⁶² Bottigheimer, *Fairy tales and folk tales*, cit.

⁶³ Zipes, *Why Fairy Tales Stick*, cit.

⁶⁴ Warner, *Fantastic Metamorphoses, Other Worlds*, cit., p. 17.

⁶⁵ J. Zipes, (ed.), *The Robber with a Witch's Head. More stories from the great treasury of Sicilian folk and fairy tales collected by Laura Gonzenbach*, New York, London, Routledge, 2004.

⁶⁶ Zipes, *Why Fairy Tales Stick*, cit., p. 18.

⁶⁷ C. Perrault, *Priče ili bajke iz prošlih vremena s poukom* [Stories or Tales of Past Times], translated by S. Lovrenčić, 2012, <<http://lektire.skole.hr/>> (last access: 07.08.2017).

⁶⁸ Cavallaro, *The Fairy Tale and Anime*, cit., p. 8.

⁶⁹ E.W. Harries, *Twice upon a Time: Women Writers and the History of the Fairy Tale*, Woodstock, NY, Princeton University Press, 2001.

At the end of the 18th century and during the 19th century there was an expansion of a fairy tale, so the most important names in this field were from that period. Fairy tales by Jakob (1785–1863) and Wilhelm (1786–1859) Grimm were published in two volumes in 1812 and 1815⁷⁰. These fairy tales carry author's interventions, but they are still a part of collection of folklore origin, which is easy to prove through Propp's morphology. Many of these stories are easily divided by the structure of a folk fairy tale. Grimm's brothers knew Straparola, as they knew the former French fairy tales. Many of fairy tales they collected had a French origin⁷¹. The Grimm's *Children's and Household Tales* (Kinder- und Hausmärchen) contain 156 stories, which is an interesting match with Andersen. Today's descriptive determination of fairy tales is totally in line with their stories. The second edition of Grimm brothers' fairy tales from 1819 is more adapted to the children's audience, with less serious scenes. Some stories were left out of the first edition. These changes were the result of criticisms the Grimm brothers received in the meantime, as a large number of their contemporaries believed that the collection, which is also by the title of the book specialized for children, must contain less violent scenes⁷². Shortly after the Grimms, from 1835, appeared the «king of fairy tales», Dane Hans Christian Andersen (1805–1875), who published a total of 156 stories. Some of them are not fairy tales according to their genre, even when they have a word fairy tale in their name.

Writing fairy tales and the appearance of an author's fairy tale does not mean that at that moment the oral fairy tales had ceased to exist. For a long time, «oral and written fairy tales have promiscuously traded plots and themes with one another both within the remit of individual cultures and across disparate lands»⁷³. The 19th century fairy tales collectors have been thinking a lot about the audience. They-starting with the Grimm brothers-mostly made interventions in the stories they wrote. We will briefly illustrate this with the example of fairy tales gathered by Vuk Stefanović Karadžić, a reformer of the Serbian language and spelling in the South Slavic area. At a time when Karadžić collects national creativity, there are more dialects in the South Slavic territory and there is no common standardized language, although Karadžić is working hard on it. His activities on collecting folk creativity are in favor of a language reform project, as the folk speech is used as a basis for the new language standard. Karadžić had a really strong co-operation with Grimm brothers, especially with Jacob, about which testifies a dedication to him devoted in the collection mentioned above. Karadžić's reference to the addressee suggests close co-operation, because he

⁷⁰ J. Grimm, W. Grimm, *The Original Folk and Fairy Tales of the Brothers Grimm: the Complete First Edition*, translated by J. Zipes, illustrated A. Dezso, New Jersey, Princeton University Press, 2014.

⁷¹ Zipes, *Why Fairy Tales Stick*, cit., p. 81.

⁷² Vuković, *Uvod u književnost za djecu i omladinu*, cit.

⁷³ Cavallaro, *The Fairy Tale and Anime*, cit., p. 6.

writes «my more than beloved and very respected friend»⁷⁴. This co-operation meant that Karadžić was very reliant on the Grimm brothers' experience, though his approach to something differed⁷⁵.

Karadžić's words from the Preface show that the written version of the story is distant from its oral versions. It is emphasized that «in the writing of the narrative, it is already necessary to think and to put the words (but again not in their taste but as a Serbian language), so that it is not excessive on one side, but that it can also be read by an educated person and listened by a common person»⁷⁶. Each adaptation carries the danger for the original work, so it is clear that many of these collectible fairy tales carry author's interventions, more or less moving away from the source. This fact partly blurs the meaning that a fairy tale had among people. Not only did these stories experience language interventions during the writing process, they were, to a certain extent, corrected by the inner artistic structure. Namely, as Svatava Pirkova-Jakobson points out, «the verbal art of all Eastern and Southern Slavic territory, in general, has always been of a preponderantly epic character»⁷⁷, and according to those and other similarities among Slavic nations (here-in Russian and South Slavic) it was more than expected for the fairy tales Karadžić wrote to perfectly follow Propp's morphology. However, the application of morphology to some of Karadžić's fairy tales has shown that at least some of these stories have a novelistic character⁷⁸. Other researchers also noted that Karadžić «undertook the stylization of stories he had collected»⁷⁹. In any case, Karadžić collected these stories and saved them in the eternally written form. It turns out that they are interesting for many generations of readers, so today there are still very diverse editions-from picture books to collections and almanacs.

For Karadžić, fairy tales were women stories or divinations, and «they are telling some wonders what cannot be»⁸⁰. Such a nomination comes from the fact that fairy tales «were identified as the products of women's imaginations»⁸¹. In Karadžić's collection, in the opinion of the collector himself, from the total of 50 texts, only 8 are so-called male, i.e. those which narrate what might be, so, realistic stories. From remaining stories, «pure» fairy tales are 33, and so

⁷⁴ V.S. Karadžić (ed.), *Srpske narodne pripovetke* [Serbian Folk Tales], collected works, Beograd, Prosveta, [1853], 1987, vol. 3, p. 46 (in Serbian).

⁷⁵ Vuković, *Uvod u književnost za djecu i omladinu*, cit.

⁷⁶ Karadžić, *Srpske narodne pripovetke*, cit., pp. 47-48.

⁷⁷ S. Pirkova-Jakobson, *Introduction*, in Propp, *Morphology of the Folktale*, cit., pp. XIX-XXII.

⁷⁸ J. Janićijević, *Prop, oko njega i posle njega* [Prop, his period and after him], in V. Prop, *Morfologija bajke* [Morphology of the Folktale], translated by P. Vujičić, Beograd, Prosveta, 1982, pp. 314-334 (in Serbian).

⁷⁹ M. Ramšak, *Vuk Stefanović-Karadžić*, in D. Haase (ed.), *The Greenwood Encyclopedia of Folktales and Fairy Tales*, 3 vols., Westport, Connecticut, London, Greenwood Press, 2008, pp. 530-531.

⁸⁰ Karadžić, *Srpske narodne pripovetke*, cit., p. 48.

⁸¹ Bottigheimer, *Fairy tales and folk tales*, cit., p. 262.

many stories from this collection belong to the category of «Tales of Magic» in ATU classes 300–749⁸². In eight stories, there are striking religious motifs (ATU 779, «Divine Rewards and Punishments», mostly), but they are absorbed by the genre and structural characteristics of a fairy tale. So, for example, the character of the devil has all the features of a wicked, evil wizard. These stories fairly literary correspond to other fairy tales of the European people, they contain numerous digressions and episodes that build specific rings around the main narrative line and have complicated subplots. Some of these fairy tales represent a rich folk imagination and a strong inclination to the mystery, reflected by the vivid South Slavic metanarrative. Fairy tales in the Karadžić's collection show patriarchal masculine domination and, in general, (in addition to two strikingly beautiful exceptions of stories that are not «pure» fairy tales *The girl overcomes the Emperor* and *The Girl is faster than a horse*), there is an evident male perspective of narration. Such a perspective is distinguished in other collections of fairy tales from that period, originate from the fact that the collectors were mostly men⁸³. That data contributed to the gender non sensitive nature of the fairy tale, and some theoretical approaches express radical ratings and determine a fairy tale as a retrograde narrative.

Nevertheless, in the same period there were also those folk fairy tales in which «represent more genuinely and more candidly the female if not feminist perspective on life, reveal social conditions from the point of view of an oppressed lower class, and do so with gusto, bitterness, and even hope»⁸⁴. Laura Gonzenbach wrote fairy tales by narration of Sicilian villagers and middle-class women, and the process of collecting that storytelling she started without «higher» goals. Therefore, these stories faithfully transfer the folk version from a female perspective. This does not mean that there is no violence, aggression, bad family relationships, envy, deception and other factors of evil. On the contrary, it is all present, but in narrative there is a remarkable gender and class sensibility and dimension of a more just and realistic relation to heroes and heroines. Stories point to heavy livelihoods and tellers have «used them to comment on their lives and on how they wished to change them»⁸⁵. The first story from the publication of these fairy tales edited by Jack Zipes is named *The Clever Maiden*. The text is notable opposition of the male and female principle. One brother has seven sons and the other is a parent of seven daughters. The first one considers himself to be lucky, leaving no chance to remind the brother

⁸² H.J. Uther, *The Types of International Folktales, a Classification and Bibliography, Based on the System of Antti Aarne and Stith Thompson*, Helsinki Suomalainen, Tiedeakatemia /Academia Scientiarum Fennica, 2011.

⁸³ Zipes, *The Robber with a Witch's Head*, cit., p. XII.

⁸⁴ *Ibid.*, p. XII.

⁸⁵ *Ibid.*, p. XVIII.

that girls are «seven flower pots», and boys are «seven swords»⁸⁶. Narrative circumstances prove that the girls are still more than what he thought.

Some changes that the fairy tales experienced during writing were necessary – in the end, the very nature of the spoken language is different from its written form. A fairy tale is also adapted to the needs of a diverse accountable audience. A fairy tale is very well adapted to its written form, with the fact that since 1835 Andersen has shown exceptional possibilities of written fairy tales. The customization procedure can be illustrated by proportion of descriptive and lyrical elements within the narrative framework. A folk tale is without descriptive and lyrical elements while Perrault and Grimm brothers have very few, and Andersen's descriptions has a significant place and role, and the lyrical element is all-pervasive.

3. *Adaptation of a fairy tale to the circumstances of 20th and 21st century*

In the second half of the 19th and early 20th century *the fantastic* and *the uncanny* is developing, so *the marvelous* does not have such a domination as it had ruled until then. Said by Todorov's language-attribute of *the fantastic* in the narrow sense is that the main event can be explained by some logic (sleep, bunny, dizziness, etc.), for *the uncanny* explanation is connoted in the dark side of the famous and familiar, while for a fairy tale *the marvelous* reader does not look for explanations logic of events. At the time of the shift of the ages, all the fantastic categories were the actual ones (*the marvelous, the fantastic, the uncanny*), but with an uneven intensity. Categories in the literature of that time existed separately, and the works were marked by pure categories.

At the beginning of the 20th century, voices were heard for a fairy tales abnegation of educational value. Let's say, Maria Montessori, a prominent pedagogical reformer, was negatively oriented towards fairy tales and this kind of creativity in general. Montessori presented her thoughts about fairy tales on the lecture in London, in 1921. This lecture has caused reactions throughout Europe⁸⁷. Natural education and practical pedagogical thought directed at the creation of a new man who will be free at the same time, self-employed, self-discipline and focused on building the peace, Montessori did not allow children to be educated by fairy tales, leading them to worlds where there is no real «order». For Montessori, «the order» was an important concept, and it was found in the early childhood psychology marked by an «absorbent mind»⁸⁸. She found that there is a «period of special susceptibility to the order». A fairy

⁸⁶ *Ibid.*, pp. 1-4.

⁸⁷ Vuković, *Uvod u književnost za djecu i omladinu*, cit., pp. 171-176.

⁸⁸ Montessori, *The Absorbent Mind*, cit.

tale's legality did not respect the real order, and Montessori did not consider them useful in Casa dei Bambini, nor in elementary schools.

After a short hibernation phase at the turn of the ages, the fairy tale shown to have possibilities for survival and new adaptations, which is another proof of its powerful artistic nature, because «metamorphosis is the principle of organic vitality as well as the pulse in the body of art»⁸⁹. Since this species specializes in waking up the hope for a hard time, it's a good part of the 20th century, and the well-known 21st century, the ideal *mise-en-scène* for its metaphors. A fairy tale has been enrolled through various media into socio-cultural patterns of 20th and 21st centuries. Each of the media provided her with new opportunities. Picture books and illustrated books have given her exceptional visual support, which has itself become an inspiration to creativity. Many famous illustrations by Walter Crane, Gustav Doré, Ivan Bilibin, George Cruikshank etc. are interpreted, analyzed, put in correspondence with the text⁹⁰. Some illustrations fulfil the *point of uncertainty* of the text. Since a fairy tale speaks of dragons, fairies, witches, roar-birds, phoenixes... it is challenging for illustrators, because of the direct realistic correlation does not exist for many motifs. The development of the printing industry, the popularization of the picture book and its increasing accessibility were important for the fairy tale, but the film will offer extraordinary possibilities to this story.

At the beginning of the 20th century, namely 1922, young Walt Disney (then twenty-year-old and at the beginning of his career) founded a studio and finds Perrault's fairy tales and brothers Grimm's as an important inspiration, which will have an interest in Disney's Production to date. In 1922, in the Laugh-o-Gram⁹¹ study, the first version of the *Little Red Riding Hood* was recorded. This film belongs to the so called group of Disney's short animated films and it's the first in series of six movies inspired by famous fairy tales. Ten years later, i.e. 1931, there was a new interest in the fairy tale in this studio and, starting with *The Ugly Duckling*, 11 short films were recorded based on the texts of famous fairy tales' writers. Along with the short film, Disney starts shooting animated feature films, including *Snow White and the Seven Dwarfs*. By 2013, dozens of animated feature films had been recorded as a result of the adaptation of fairy tales. The latest adaptation of *The Snow Queen* of 2013 was called *Frozen*. An exceptional fairy tale interferes with numerous connotations in the face of two fantastically fruitful motifs: mirror glass (i.e., mirror as a reverse image of reality) and ice.

Critics have discussed each adaptation by comparing the original text of a fairy tale with film narratives. It is almost unanimous that the text versions are of undoubtedly superior quality and that many film adaptations disturb a fairy

⁸⁹ Warner, *Fantastic Metamorphoses, Other Worlds*, cit., p. 2.

⁹⁰ Zipes, *The Oxford Companion of Fairy Tales*, cit.

⁹¹ <<http://www.laughogramstudios.com/>>.

tale's message and lead to moral simplification⁹². The film adaptation of fairy tales during the 20th century has been extended to many cinematic homes, but the adaptations of Disney's studies were provocative and each received a series of criticisms⁹³.

In recent years, featured films include: *Maleficent* (2014), *Into the Woods* (2014), *Cinderella* (2015), *Beauty and the Beast* (2017). All of these movies have recorded a global reception. This testifies well to the need for an old story. Whether it is repatriarchalization, or the young public's pressure of reality suggests the necessity of escape into a fairy tale world, or the mass entertainment industry aggressively imposes globalization patterns-it's hard to say. Probably all of this has a role in the excellent reception of these movies. In the film industry (mostly as adaptations), other forms of fantasy are also impressive. Fantastic code is often used to relieve the fear of real dangers by shifting to a world that apparently does not look like reality. A fairy tale and her concern for human psyche are most noticeable from numerous metaphorical replacements-instead of talking about violence in the real family, a fairy tale transports it to indefinite but far-off time *once upon a time* and the role of violators and colonizers entrusts to witches, dragons, boogeyman, werewolves, wolves and other inhumane forms. A fairy tale also «washes human blood», for example, animals throw away the ugly duckling (not people), mostly stepmothers (and not mothers) are bullies, wolves or werewolves are rapists (and not human beings) etc.

In new movies, a number of narratives (*Into the Woods*) are intertwined, as in some of the new works obviously the mix of fantastic genres. A fairy tale has been recorded as novel in: *Harry Potter* by J.K. Rowling, *A Game of Thrones* by G.R.R. Martin, and *Twilight Series* by S. Meyer etc. The hybridization of genres leads to the power of narration and the aesthetic distance is achieved in a partially anticipated *horizon of expectations*. Let's say, *A Game of Thrones* betrays the horizon of expectations and gets rid of even the most ridiculous predictions⁹⁴. Many of the ancient motifs are recognized in the series, but-despite the color of the text with many texts created earlier-it is striking that the reader faces a challenging receptionist act. The reception is complex starting from the impossibility of identifying with a literary figure, because the characters exist as much as they need to be read and accepted by the reader. Almost at the very moment of acceptance, the figure is removed. Although there is little extensive research on this series, whose creation and development is being followed, the epic force of fantasy can be perceived as numerous streams of a fairy tale. The stream is a fairy tale, or part of a fairy tale, which evolves from a single infliction

⁹² Hastings, *Moral Simplification in Disney's The Little Mermaid*, cit.

⁹³ J. Cummins, *Romancing the Plot: The Real Beast of Disney's Beauty and the Beast*, «Children's Literature Association Quarterly», vol. 20, n. 1, pp. 22-28; J. Zipes, *Breaking the Disney Spell*, in M. Tatar (ed.), *The Classic Fairy Tales*, New York, W.W. Norton, 1999, pp. 333-352.

⁹⁴ G.R.R. Martin, *A Game of Thrones*, New York, Bantam, 1996.

of damage to some of the functions that represent conflict resolution, according to Propp⁹⁵. In *A Game of Thrones*, rapid and dramatic storytelling is evident, *dramatis personae* often changes the scope of action, causing damage (as the function of the action stream that triggers the plot) is frequent, with villainy often sequencing into the chain without their permanent elimination.

*Harry Potter*⁹⁶ novel series can also be read through the prisms of fairytale coding. The main hero is a Cinderella's type—a child became orphan during the first year of life and was sent to parenting in a family that treats him in a way analogous to Cinderella's treatment in the home of a stepmother. The total line of the plot develops according to the principle of *leaving* the hero from home—a *return* after a series of victories over the forces of evil. Harry is completely reincarnated into an ugly duckling in the world of «normal people» and in the magical world he becomes a beautiful swan. His self-perception in the wizardry world is straightforward with a strange and fearful discovery of his own reflection in the water, which is happening to Andersen's hero. The connection of this series with fairy tales testifies also that the researchers realized that Propp's morphology is inspirational in determining the structure of the Rowling's⁹⁷ novel. Clearly, Propp's functions are not always easy to identify in a pure folk fairy tale, so researchers are quite different in terms of identifying functions in novels. What is important in the context of this paper is that many structural elements of a pure folk fairy tale exist as a subtext in this extensive and complex series. Since *Harry Potter* is globally accepted, this also suggests that a fairy tale in the contemporary children's and teenage audience has a passionate reader and viewer.

A representative example of a global popularity of a fairy tale is the well accepted *Twilight* series (2005-2008) by S. Meyer⁹⁸. Narration follows the life of a teenager named Izabella Bella Swan. Her name suggests a nominal hyperbolization of beauty—she is beautiful (Bella) as a swan (Swan). She is just like Belle from the fairy tale *Beauty and the Beast*. Unaware of her beauty, she is inadequate to her peer friends, and in a fatal moment hesitantly fell in love with the vampire (=beast) Edward. Getting used to each other, his «refinement» with the girl and the marital envoy drives the way to *happily ever after*. Besides, Bella is Cinderella. She is deprived from a clear and firm parental care (she has both mother and father, but both are immature as parents), she deals with household affairs like Cinderella and finally meets the prince, the vampire. Bella is still «the ugly duckling». The eyes she sees herself (and she is the main

⁹⁵ Propp, *Morphology of the Folktale*, cit., p. 50.

⁹⁶ J.K. Rowling, *Harry Potter*, boxed set, London, Bloomsbury, 2014.

⁹⁷ J. Lacoss, *Of Magicals and Muggles: Reversals and Revulsions at Hogwarts*, in L.A. Whited (ed.), *The Ivory Tower and Harry Potter: Perspectives on a Literary Phenomenon*, Columbia, London, University of Missouri Press, 2002, pp. 67-88; Hunter, *Folk Tale Structure as the Key to the Success of the Harry Potter Series*, cit.

⁹⁸ S. Meyer, *Twilight Series*, London, Atom Books, 2005-2008.

narrator!) are the eyes of a teenager girl who is getting mature and the storm of the youth convinced her that she is neither beautiful nor clever, etc. After the siege and the effects of the venom of her beloved vampire, the girl will experience «remedy» (as during aesthetic surgery) and woke up as a beautiful swan. So, at the end, Bella eventually looks like a fairy heroine born of the «parts of the soul and body» of many of her literary predecessors. Meyer had «recycled» the most popular fairy tale heroes and heroines and inhaled them into the life of Belle Swan. This process compounded the popularity of the heroine among the audience⁹⁹.

These examples are a typical transmedia of narratives, i.e. they are almost simultaneously published in printed form and as film screenings. Screening has popularized printed versions¹⁰⁰ and probably the audience's reactions have had an impact on the creative process. Namely, readers, and especially viewers through social networks, send suggestions and comments to authors. So today, thanks to electronic communication, Jauss's thesis on the active role of the recipient, i.e., «the reader himself takes the step of the individual to associative identification, exchanges his passive reader's role for active participation in a social ceremony, and thus returns the work of art to the status of a game»¹⁰¹. Such a status explains the part of the popularity of the transmedia narrative. Such narratives are important to consider as symbiotic products, i.e. analyze them as parts of a story-puzzle, because these narratives achieve the final effect on the audience in resultants of the printed and screened stories.

Fairy tales continue to expand, not only in the film media, but also through opera, ballet, comics, etc., and they are remarkably enrolled in many contemporary artworks. The suggestion of this story is growing steadily, exponentially, and today it is possible to talk about the fairy tale revolution. This shows that the real world has become particularly dangerous because we are running from it «into the woods», to Hogwarts, into the arms of the vampire, and to other mythical places. The need for a fairy tale exists in the modern world, i.e. fairy tales readers or recipients in other arts show great interest in this genre. As civilization changed, became more complex, technically and technologically superior, so the fairy tale progressed alongside it, i.e. the fairy tale and the fantasy genre have a strong influence *vis-à-vis* technology of modern life. Thus the fairytale narratives that attract the most powerful audience today gather ancient motives for the struggle of good and evil, but: in a much more complex form (it comes to interlacing or interference of fairy tales), with a more complex structure (narrations are extensive, with many streams), often

⁹⁹ Pajović-Dujović, Vučković, *Reincarnation of the Vampire Character in Literature for Children and Youth in the Twilight Series by Stephenie Meyer*, cit.

¹⁰⁰ K.H.Y. Lee, *Audience Response and from Film Adaptation to Reading Literature*, «CLCWeb: Comparative Literature and Culture», vol. 18, n. 2, 2016, <<https://doi.org/10.7771/1481-4374.2957>> (last access: 30.09.2017).

¹⁰¹ Jauss, *Aesthetic Experience and Literary Hermeneutics*, cit., p. 165.

as a transmedia narrative (story is materialized through several art forms, most often in the combination of a book and movie, so the final version is realized in the consciousness of the recipient as a resultant of the basic forms). The media's resonance of a fairy tale is growing in this century, followed and encouraged by reception, so it can definitely be observed that the evolution of a fairy tale has resulted in its revolution. Cultural and civilizational circumstances have clearly contributed to this, such as: social anomie, aggressive pressure of technique and technology on everyday life, the necessary adaptations through which the person goes through. Pandora's Box is a mythical symbol of many pestilences, it was opened in the 21st century, and along with it, a man reads and tells those stories that help him build virtual alternatives to a fairly discouraging reality. Fairy tales are those kinds of stories.

What is actual about a fairy tale in education?

Following the evolution of the fairy tale line, we have pointed to its popularity in some times, but also occasional denial. The changing status of a fairy tale is conditioned by a different look at its nature. When it is incorporated into education, a fairy tale has the dominant role of transmitting morality in the broadest sense of the word. By that we mean socially coded patterns of behavior. In connection with this, there are numerous critical readings expressing the negative estimates of a fairy tale moral and calling it retrograde, conservative, traditionalist, etc. (Pre)emphasizing moral, the conceptual layer of a fairy tale pushed all the other layers, and it is concluded that the true nature of this story is neglected in education. In any case, a fairy tale is reduced or lost in the education of «the richness of fairy tales, their polyphony, their multilayered construction and-most importantly-their status as three-dimensional puzzles wherein truth and fact never easily coincide»¹⁰².

We emphasized that young readers have a strong need for a fairy tale. Many of the globally popular titles are either entirely a fairy tale, or are included in their more complex structure of fairy tales as a sub-text. In such a situation, «if fantasy is to provide resistance to real social conditions in the form of critical reflection and spiritual regeneration, we must first know what it is and how it operates in our brains»¹⁰³, i.e., it is important that teaching provides children with the knowledge and skills that will help them understand what a fairy tale is, what is its relation to the real world, and what it tells us about the world. Of course, in agreement with many critical evaluations of a fairy tale, it is necessary

¹⁰² Cavallaro, *The Fairy Tale and Anime*, cit., p. 9.

¹⁰³ Zipes, *Why Fantasy Matters Too Much*, cit., p. 2.

that we develop critical and reflexive skills in young readers and to direct them to read the story with a research-based and problem-based approach.

The nature of a fairy tale, its evolution and contemporary revolution (extending the existence of genre), adaptation and others, the role of a fairy tale in education direct towards the development of critical reading skills. Understanding a fairy tale, its subjects and motifs, language, and style can be a great inspiration for careful reading and critical understanding, whereby the fairy tale should not only be viewed through one theoretical lens. Gender and class stereotypes, as well as other retrograde elements that exist in some fairy tales, can only be deconstructed by reading and comparing more fairy tales and by analyzing their adaptations. Compare-contrast of fairy tales is a good space for research and learning. The story then serves as a «cognitive puzzle»¹⁰⁴. If we start from the fact that the remarkable amount of critical work is inspired by a fairy tale, then that the so-called *oppositional readings*¹⁰⁵, and having acquired life in other media, the fairy tale obviously inspires the reader. Since the 21st century requires many adaptations from the mankind (and perhaps initiates some new evolution-natural or laboratory!), a story that has adaptable properties helps in these processes¹⁰⁶. Good reception of a fairy tale suggests that a reader needs it.

Reader-response criticism¹⁰⁷ is a good methodological framework for the teaching interpretation of a fairy tale. A fairy tale just proves Jauss's thesis that classical texts are like scores and that they are created for a new resonance reading in every epoch. Before reading a fairy tale in the classroom, we are motivating students and forming a horizon of their expectations. In that horizon, aesthetic distance will be determined after reading and interpreting the text. It is important to keep in mind that the meaning of the text does not exist independently of the reader, i.e.:

Every reading act is an event, or a transaction involving a particular reader and a particular pattern of signs, a text, and occurring at a particular time in a particular context. Instead of two fixed entities acting on one another, the reader and the text are two aspects of a total dynamic situation. The «meaning» does not reside readymade «in» the text or «in» the reader but happens or comes into being during the transaction between reader and text¹⁰⁸.

¹⁰⁴ Nikolajeva, *Reading for Learning*, cit., p. 74.

¹⁰⁵ C.F. Sun, E. Scharrer, *Staying True to Disney: College Students' Resistance to Criticism of The Little Mermaid*, «The Communication Review», vol. 7, n. 1, 2004, pp. 35-55.

¹⁰⁶ Zipes, *Why Fairy Tales Stick*, cit.

¹⁰⁷ Iser, *The Implied Reader*, cit.; Jauss, *Aesthetic Experience and Literary Hermeneutics*, cit.; L.M. Rosenblatt, *The Transactional Theory of Reading and Writing*, in D.E. Alvermann, N.J. Unrau, and R.B. Ruddell (edd.), *Theoretical Models and Processes of Reading*, 6th ed., Newark, International Reading Association, 2013, pp. 923-956.

¹⁰⁸ Rosenblatt, *The Transactional Theory of Reading and Writing*, cit., p. 929.

In order for reading to correspond to the transaction model reader-response reading-in which the reader is actively involved and constructs meaning from the text taking into account his own experience-it is necessary that the teaching interpretation is organized in three stages: evocation, response, and interpretation, the way Rosenblatt called it. Critical reading models have been developed precisely on the assumption of the reader-response theory.

Critical reading leads to the deeper layers of a fairy tale and the deciphering of its metaphor and/or metonymy. Such reading is methodically elaborated through various frameworks, especially within *Reading and Writing for Critical Thinking* (RWCT) program¹⁰⁹. In the RWCT program, critical reading is achieved through a three-way model of teaching interpretation. The stages are: evocation, understanding of meaning and reflection or anticipation, building knowledge, consolidation (the names are different than Rosenblatt's but the transactional essence is the same) and developed techniques and strategies provide active and complete involvement of young readers in the reception process. The first phase forms the horizon of students' expectations, they remember the knowledge they already have on the subject and express expectations. In the second stage, the text is read and analyzed by one of the RWCT techniques and strategies, and in the third step the aesthetic distance is determined, i.e. where consolidation and systematization of the learned so far is done. RWCT has developed a number of techniques and strategies in this three-phase model. Let's say, the technique of «readings in sequences» is carried out by the same model as Scheherazade tells in *1001 night stories*. Therefore, during the reading the «cut» technique is used i.e. a reading pause takes place in those parts that are particularly dramatically colored, so that readers are put in a position to problematize and discuss the possible course of an action. Some of the techniques involved in the critical reading model are: brainstorming, K-W-L chart, Venn's diagram, paired reading, question-board, think-pair-share, semantic map, character map, directed reading activity, read with text coding, jigsaw (cooperative learning technique)¹¹⁰. Since the act of reception is dualistic and encompasses emotional experience and understanding, a fairy tale imposes itself as a particularly fruitful kind for the development of socio-emotional but also cognitive and conative competences of students. This development should not be stressed by direct warnings and indirect threats to the desired moral-as is often the case-rather than the explorative optics of critical reading that plunges into deeper layers of fairy tales.

A fairy tale must be set in education in accordance with the reception capabilities of students. Children are interested in fairy tales from the early

¹⁰⁹ A. Crawford, W. Saul, S.R. Mathews, J. Makinster, *Teaching and Learning Strategies for the Thinking Classroom (A Publication of the Reading and Writing for Critical Thinking Project)*, New York, The International Debate Education Association, 2005.

¹¹⁰ *Ibid.*

age, which is certainly contributed by their tone, that is, only the sound of inverse narrative sequences, the appearance of imaginary beings, etc. Many of the adaptations were the steps towards approaching the fairy tale to a small child. Thus the illustrations of fairy tales and the creation of picture books were important for the child, but the film adaptation made a fairy tale even closer to younger recipients. Some corrections of the original text made in Disney Studio-such as the motivation of the Prince's transformation into a beast in *Beauty and the Beast* or the ending of *The Little Mermaid*-were aimed at helping children to better understand a fairy tale. Criticism has shown that many of these adaptive interventions harm the original narrative. Even if it is not like that, that the mentioned adaptations are acceptable, the question remains as to how the connotative fairy tale elements can be simplified in order to be receptively appropriate for early ages. The nature of a fairy tale is defined by its genre category-*the marvelous*-which is implemented in the text by the rich figurative language. Such a language is opposed to deciphering, preserves polysemy, and transmits it to new times, new texts, and new media. Part of the secret of survival and sustainability of a fairy tale is its language.

Since the fairy tale is a literary type that has experienced numerous metamorphoses and is often adapted, as a particular issue in the classroom, it is also the observation of its structure and changes that occur during adaptation or retelling. In order for teaching to give children a broad understanding of this complex genre, comparative approaches to study of fairy tales is particularly important. In the teaching process we can perform different comparisons related to fairy tales. Let's say:

- It is necessary to compare stories under the same title (classical fairy tales have many versions), or fairy tales of the same type, i.e. fairy tales classified in the same class according to the international classification of the ATU¹¹¹). For example, the ATU 410 stories were named as *The Sleeping Beauty* and they have the main motive for a remarkable hundred-year-old sleeping of a young girl, who is finally kissed by a destined prince. There are several stories like that in the ATU database (Basile – *Sun, Moon, and Talia*, *The Young Slave*, Perrault – *The Sleeping Beauty in the Wood*, The Brothers Grim – *Sleeping Beauty / The Little Briar Rose*, *The glass coffin*).
- The story should be compared with its adaptations, picture books, cartoons and feature movies. Such comparisons will show the children exactly what differences have been made in the basic narration and how these differences affect the conceptual and other values of the work.
- The fairy tales need to be seen in the role of the subtext of the larger fantasy narratives.

¹¹¹ H.J. Uther, *The Types of International Folktales*, cit.

In order for the teaching interpretation of a fairy tale to fit contemporary theoretical approaches of learning, it must be established on problem-based and research-based basics. This does not imply any particular modeling of the teaching process, but it refers to the setting up of more complex, problematic tasks that will stimulate research-peruse reading. For example, such tasks are:

1. «In some of Andersen's fairy tales, miraculous powers exist in the people themselves, and for the accomplishment of some good deeds there is no need for fairies or similar creatures. Read *The Wild Swans* and *The Snow Queen* and find out which miraculous forces helped Eliza to save the brothers and Gerda to save friends from trouble». (In both cases, the solution comes by careful reading and by observing the behavior of characters in certain situations and by determining their characteristics).
2. «Read *Beauty and the Beast* and see the Disney's production movie with the same title. Compare the text and the movie with Venn's Diagram, i.e., in the diagram, type what is the same and what is different in text and movie. Who is the main hero of the story, who is the hero of the movie? Based on that, what do we conclude?» (The movie adaptation of the famous fairy tale has shifted the focus of an action from a girl to a young man, so the movie narrative is different from the text when we talk about the hero, which strongly influences other elements of the story.)

Propp's morphological approach to the study of a folk fairy tale is not sufficiently present in the teaching study of this genre. Only recently, there are studies that deal with the possibilities of applying this theory to the teaching process. One of the more comprehensive researches was realized by Sean Hammond¹¹². The purpose of Hammond's research was to create writing software, which is structured according to the principles of the story structure in the way that sequence of Propp's functions defines it. Writing and reading are interdependent skills, and in reader-response theory the reading of literary texts is a precondition for later self-writing. Hammond's research proves that students understand Propp's description of a folk fairy tale and successfully spot functions in the text, which is positively reflected on their later writing. Based on this, but also on some other researches from the classroom¹¹³, it is possible, as part of teaching methodology, to include the establishment of a fairy tale structure, i.e. insight of the represented functions. A folk fairy tale coincides with Propp's model, but artistic fairy tale and more complex narratives deviate slightly.

In the teaching process, the introduction of Propp's fairy tale structure should be carried out according to the following stages:

¹¹² S. Hammond, *Children's Story Authoring with Propp's Morphology*, Edinburgh, University of Edinburgh, 2011, PhD Thesis.

¹¹³ D. Andonovska-Trajkovska, *Propp's Functions Recognized in the Children's Perceptions of the Fairy Tales*, «Procedia-Social and Behavioral Sciences», n. 46, 2012, 1695-1700.

1. Presentation of Propp's morphology of a fairy tale. At this stage it is necessary, as simple as possible; to demonstrate to children the function, i.e. show that the function is a process that has certain consequences for the further course of an action. In doing so, the function is determined independently of the person who performs the action. It is also important to analyze the sequence of functions, their cause-effect relationship, etc. For the sake of clarity, Propp's cards should be used to illustrate functions with entered names¹¹⁴.

2. In the forthcoming phase, the children practice previously learned and expanding knowledge, they play with Propp's cards, align them, notice which one is missing, what kind of association is among the cards, etc. The goal of this phase is to give basally knowledge of functions.

3. After the previous activities, it is necessary to determine the structure of simple fairy tales (e.g., *The Wolf and the Seven Young Goats*, *Little Red Riding Hood*, etc.), and gradually move to the more complex ones.

4. When the students are already well acquainted with the functions and their order, still using Propp's cards, more complex narratives are analyzed, such as movie adaptations, extensive fantasy novels, and so on.

Every time, after identifying the text structure (which is a problem-research task), a fairy tale is interpreted using the theoretical framework that most fully points to its key elements.

Pedagogical and psychological caution requires that we always have to take care of the level we interpret fairy tales to children. It is already mentioned in this text that many fairy tales are dealing with «difficult» realistic themes. Children of early ages cannot face these and such emotional issues even if they can understand metaphors and metonymy, i.e., if they were cognitively ready for the depth of a fairy tale. In education, the way and the possibility of reading fairy tales in early childhood (pre-school and younger classes without any deeper deciphering of the figurative language) should be re-examined, and later-in the years when children reach formal-logical thinking, which occurs after the twelfth year¹¹⁵. In that period a fairy tales can be of great use and can support socio-emotional, cognitive and conative development.

¹¹⁴ Hammond, *Children's Story Authoring with Propp's Morphology*, cit.

¹¹⁵ J. Piaget, B. Inhelder, *Intelektualni razvoj deteta* [Intellectual Child's Development], Beograd, Zavod za udžbenike i nastavna sredstva, 1978 (in Serbian).

Educazione e scuola nell'opera di Geremia Bonomelli

Andrea Marrone
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
marroneandrea86@gmail.com

Education and School in Geremia Bonomelli

ABSTRACT: Geremia Bonomelli (1831-1914), bishop of Cremona for more than forty years, was one of the most important figures of Italian Catholicism of his time. His life, pastoral work and books have been widely studied, while his pedagogical and scholastic interests remain largely unpublished. Despite the historiography gap, he committed to education of young people, promoted a new catechetical method, took care of the situation of the Italian school and its legislation. Differently from other Catholics, Bonomelli defended the fundamental role of the State in the government and management of the school, proposing an alliance between national and religious education. The article aims to highlight Bonomelli's pedagogical and school views, which appear particularly important in the Italian Cristian pedagogy.

EET/TEE KEYWORDS: Education system; Catechism; Catholicism; Principles of education; Teaching; Italy; XIXth-XXth Centuries.

L'impegno pastorale e culturale di Geremia Bonomelli ha attirato da tempo l'interesse dei ricercatori¹. Tra i vari aspetti della sua opera, merita di

¹ Cfr. *Geremia Bonomelli vescovo di Cremona nel XXV anniversario della morte. Miscellanea di studi commemorativi*, Milano, Ancora, 1939; C. Bellò, *Geremia Bonomelli: con documenti inediti*, Brescia, Morcelliana, 1961; G. Gallina, *Il problema religioso nel risorgimento e il pensiero di Geremia Bonomelli: con documenti inediti*, Roma, Università Gregoriana, 1974; C. Bellò, *Geremia Bonomelli vescovo di povera santa Chiesa*, Brescia, Queriniana, 1975; G. Gallina, *Bonomelli Geremia*, in F. Traniello, G. Campanini (edd.), *Dizionario storico del movimento cattolico in Italia 1860-1980*, Casale Monferrato, Marietti, 1982, vol. 2/1, pp. 47-52; *Un'eredità feconda e impegnativa. Il vescovo Geremia Bonomelli ottant'anni dopo. Atti delle celebrazioni*, Cremona, Fantigrafica, 1995; G. Gallina, *Il vescovo Geremia Bonomelli e la diocesi di Cremona dal compimento del processo unitario italiano alla vigilia della prima guerra mondiale (1871-*

essere ulteriormente indagato il contributo intorno alle questioni educative e scolastiche, rimasto per lo più sullo sfondo². Pur di taglio non specialistico, l'apporto di Bonomelli in questo versante appare ricco di spunti originali, nonché capace di incidere nel dibattito coevo e successivo. Il presente saggio si propone di iniziare ad approfondire la dimensione pedagogica della sua opera, mettendo in luce le posizioni del prelado lombardo intorno alla scuola e alle politiche scolastiche.

1. *Il «vescovo d'Italia»*³

Geremia Bonomelli nacque il 22 settembre 1831 a Nigoline, un piccolo paese in provincia di Brescia. Dopo gli studi in seminario, fu ordinato sacerdote il 2 giugno 1855. Perfezionò gli studi teologici a Roma, dove nel 1857 conseguì il dottorato in Teologia dogmatica presso l'Università Gregoriana. Tornato nella sua diocesi, insegnò Ermeneutica, Teologia e Filosofia della religione in seminario.

Nel 1866 iniziò il suo apostolato come parroco di Lovere. Appena cinque anni dopo, fu eletto vescovo di Cremona. Nei primi anni del suo episcopato l'azione pastorale si concentrò sul rinnovamento del corpo sacerdotale e la formazione dei giovani. Approvò le nuove norme disciplinari per il clero, fondò nuovi oratori, aprì numerose scuole popolari gratuite, favorì la diffusione di circoli operai e studenteschi. Si adoperò per incrementare la presenza delle congregazioni religiose nella diocesi, incoraggiando la fondazione di nuove opere educative.

Sebbene avesse manifestato una significativa sensibilità conciliarista sin dall'inizio del suo magistero, fu l'esperienza dell'episcopato a spostarlo su posizioni "transigenti". Dagli anni '80 in poi, divenne uno dei principali punti di riferimento dei cattolici liberali, sostenendo una serie di istanze: l'abolizione del *non expedit*, la necessità di un diretto impegno partitico ed elettorale dei cattolici, la risoluzione della «questione romana» con la riformulazione delle rivendicazioni territoriali, l'accettazione del regime di separazione tra Stato e Chiesa. Manifestò,

1914), in A. Caprioli, A. Rimoldi, L. Vaccaro (edd.), *Diocesi di Cremona*, Brescia, La Scuola, 1998, pp. 309-359; G. Rosoli (ed.), *Geremia Bonomelli e il suo tempo: atti del convegno*, Brescia, Fondazione Civiltà Bresciana, 1999; E. Mazzella, *Bonomelli Geremia*, in G. Chiosso, R. Sani (dir.), *Dizionario biografico dell'educazione*, 2 vols., Milano, Editrice Bibliografica, 2013, vol. 1, pp. 193-194; A. Fappani, W. Montini, U. Perini, *Mons. Geremia Bonomelli, un grande bresciano vescovo di Cremona*, Brescia, Fondazione Civiltà Bresciana, 2015.

² Tra i pochi lavori che hanno approfondito la dimensione educativa e pedagogica del vescovo si vedano: A. Dordoni, *La «Donna studiosa» di Dupanloup nella riflessione di Geremia Bonomelli*, in L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 211-238; C. Pedretti, *Il vescovo Geremia Bonomelli e la catechesi in Italia tra Otto e Novecento*, in Rosoli (ed.), *Geremia Bonomelli e il suo tempo: atti del convegno*, cit., pp. 485-496.

³ P. Mazzolari, *Il mio vescovo Mons. Bonomelli*, Vicenza, La Locusta, 1974, p. 6.

poi, un originale lealismo, soprattutto se paragonato al resto del mondo cattolico, nei confronti delle autorità civili e della casa Savoia.

Le sue posizioni furono all'origine di varie incomprensioni con la Chiesa ufficiale. Nel marzo del 1889 fece molto scalpore l'«intempestivo»⁴ articolo intitolato *Roma, l'Italia e la realtà delle cose. Osservazioni di un prelado lombardo*. In questo saggio, pubblicato anonimo sulla «Rassegna Nazionale», Bonomelli, oltre a ribadire le sue posizioni intorno al rapporto tra Stato e Chiesa, avanzò una possibile soluzione conciliativa, proponendo che al Papa venisse concessa una «miniatura di Stato» sulla riva destra di Roma con una striscia di terra sino al mar Tirreno. Già il 13 aprile lo scritto fu posto all'Indice. Bonomelli decise di rivelarsi pubblicamente come l'autore dell'articolo e, a conclusione dell'omelia di Pasqua del 21 aprile, confessò le sue responsabilità, ribadendo però totale obbedienza al Papa. Nonostante le pubbliche scuse, la fiducia del Vaticano sembrava essere venuta meno, e si iniziò a pensare ad un suo trasferimento. Nel 1892 gli venne profilata la possibilità di una missione temporanea in sud America, nell'intento di stabilire un'intesa fra alcuni governi del continente e la Santa Sede. Il progetto rimase tuttavia sospeso per alcuni mesi, per poi sfumare. Nuove frizioni con Roma si registrarono con la pubblicazione de *La chiesa e i tempi nuovi* (1906) e poi con la crisi modernista.

In quegli stessi anni, l'attenzione pastorale di Bonomelli si concentrò sempre più sulla situazione di povertà e disagio delle campagne e del proletariato. Nel tentativo di sottrarre le classi più povere alla propaganda radicale e socialista, approfondì tratti e drammi della questione agraria e operaia, rifiutando da una parte le soluzioni anticapitaliste dei socialisti, ma sostenendo dall'altra la necessità di giusti accordi tra i lavoratori e i proprietari, nel segno di un pieno rispetto del lavoro e della dignità umana. Anticipando la *Rerum Novarum*, pubblicò *Proprietà e socialismo* (1886), e poi *Capitale e lavoro* (1891), *La questione sociale* (1892) e *Una parola amica a tutti gli operai* (1895). Sul piano dell'azione concreta, sostenne inoltre l'azione dei laici, incoraggiando la nascita di società di mutuo soccorso, associazioni di lavoratori, leghe cattoliche del lavoro, casse rurali, ma anche cooperative e centri di studio su tematiche sociali.

Il suo impegno per le fasce più disagiate si manifestò anche nell'attenzione verso il fenomeno dell'emigrazione. Come ricordato recentemente da Roberto Sani, le iniziative e gli interventi del Bonomelli sulla questione migratoria furono decisivi per far maturare, sia nel mondo cattolico sia nel mondo laico, una maggiore consapevolezza sul tema, ispirando un maggiore impegno pubblico e privato⁵. Oltre a trattare specificatamente del tema nella pastorale *Sull'emigrazione*⁶,

⁴ F. Fonzi, *I cattolici e la società italiana dopo l'Unità*, Roma, Studium, 1977, p. 62.

⁵ R. Sani, *Tra esigenze pastorali e impegno per la preservazione dell'identità nazionale: la Santa sede e l'emigrazione italiana all'estero tra otto e novecento*, «História da Educação», n. 1, 2017, p. 149.

⁶ G. Bonomelli, *L'emigrazione*, Cremona, Tip. Giovanni Foroni, 1896. Poi ripubblicata dalla stessa editrice nel 1900 e dalla Desclée di Roma nel 1910, 1911 e 1912. Nel 1919 curò una nuova

Bonomelli diede vita all'«Opera di assistenza per gli emigrati italiani in Europa e in Oriente», poi «Opera Bonomelli» dopo la sua morte⁷.

Avviata nel 1900, l'iniziativa si prefiggeva di assistere «con opere di religione e di educazione, di previdenza, cooperazione e carità, gli italiani emigrati in Europa e nel Levante»⁸. In poco tempo, l'Opera diede vita a numerose iniziative, come la fondazione di scuole e asili per gli emigrati, centri di ospitalità, ospizi alle frontiere, ed una generale assistenza materiale e religiosa agli operai.

Nell'ultimo scorcio della sua vita, Bonomelli si distinse anche per le aperture ecumeniche. Nel giugno del 1910 fu invitato a partecipare al Congresso delle confessioni cristiane che si tenne ad Edimburgo il 14 e 15 giugno 1910, organizzato dallo statunitense ed episcopaliano Silas McBee. Non potendo raggiungere l'assise, volle però scrivere un messaggio, sottolineando l'importanza dell'incontro. Fu l'unico intervento di un rappresentante cattolico.

Bonomelli morì a Nigoline il 3 agosto 1914.

2. La dimensione pedagogica nelle sue opere

Sebbene l'impegno pedagogico e scolastico di Geremia Bonomelli sia stato approfondito solo in modo tangenziale dalla storiografia, esso ricopre un ruolo centrale nel suo magistero e nella sua produzione culturale. Tra le più di duecento opere pubblicate⁹, una parte considerevole è dedicata a tematiche educative, catechetiche e scolastiche. I due più noti e conosciuti saggi del

edizione la Tipografia Paolo Neri di Bologna.

⁷ Sull'Opera Bonomelli si vedano: G. Prato, *L'emigrazione temporanea italiana e l'opera di assistenza di Mons. Bonomelli*, Torino, Roux e Viarengo, 1901; 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; Bellò, *Geremia Bonomelli: con documenti inediti*, cit., pp. 142-178; Id., *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», n. 1, 1966, pp. 5-25; Id., *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», n. 1, 1971, pp. 33-52; O. Confessore, *Origini e motivazioni dell'associazione nazionale per soccorrere i missionari cattolici italiani*, «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia», n. 2, 1976, pp. 239-267; P. Cannistraro, G. Rosoli (edd.), *Emigrazione, chiesa e fascismo: lo scioglimento dell'Opera Bonomelli (1922-1928)*, Roma, Studium, 1979; O. Confessore, *L'«Associazione nazionale per soccorrere i missionari cattolici italiani» tra spinte «civilizzatrici» e interesse migratorio (1887-1908)* e G. Rosoli, *Scalabrini e Bonomelli: due pastori degli emigranti*, in G. Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno storico internazionale (Piacenza, 3-5 dicembre 1987)*, Roma, Centro Studi Emigrazione, 1989, pp. 519-536, 537-556; G. Rosoli, *L'Opera Bonomelli nei paesi europei. L'emigrazione italiana 1870-1970*, Roma, Ministero per i beni e le attività culturali - Direzione generale per gli archivi, 2002, pp. 439-457.

⁸ Bellò, *Geremia Bonomelli: con documenti inediti*, cit., p. 160.

⁹ Cfr. A. Fappani, L. Rosoli, *Bibliografia bonomelliana*, Roma, Centro Studi Emigrazione, 1996.

prelato lombardo, inoltre, si presentano come il frutto di un'intensa riflessione educativa. Si tratta de *Il giovane studente* e di *Seguiamo la ragione*.

Il primo può essere considerato il libro più conosciuto e diffuso del vescovo di Cremona. Stampato in tre volumi tra il 1871 e il 1874¹⁰, fu elaborato pensando ad un pubblico studentesco. Il rettore del collegio di Lovere, dove Bonomelli era il direttore spirituale dal 1866, gli propose infatti di scrivere un manuale capace di proporre agli allievi i nuclei fondamentali della fede cristiana, utilizzando un linguaggio adeguato ai tempi e ai giovani. Il testo ebbe in poco tempo un notevole successo. Negli anni e decenni seguenti fu variamente rivisto e ripubblicato. L'ultima edizione fu stampata tra il 1950 e il 1951 per cura del sacerdote e suo ex allievo Guido Astori. Considerando tutte le edizioni, arrivò a contare quasi 50.000 copie.

Il testo rappresenta il tentativo di offrire una ragionata testimonianza del significato della fede cattolica, motivo principale dell'azione culturale e pastorale del Bonomelli¹¹. Il saggio si presenta in forma di dialogo, e vede impegnati un maestro e un giovane discepolo in centoquarantasei «trattenimenti». Questa scelta stilistica, poi sempre più diffusa nella catechetica, fu giustificata dallo stesso Bonomelli per la sua maggiore efficacia didattica¹².

Diversa appare la struttura de *Seguiamo la ragione*. Qui l'autore si rivolge direttamente al lettore, preferibilmente quello lontano dalla religione e dalla Chiesa, nel tentativo di iniziare un percorso alla scoperta del cristianesimo seguendo, appunto, la sola ragione¹³. Il primo volume uscì nel 1894 con l'editrice Cogliati, e fu intitolato *Dio creatore*. Introducendolo, Bonomelli ne parlò come un «compendio razionale della nostra fede»¹⁴. Il libro rappresenta una rivisitazione del libretto *Lezioni fondamentali per le Scuole Superiori di Religione*¹⁵. Nel 1898 con la nuova edizione del primo volume, uscì anche il secondo, *Gesù Cristo. Dio-uomo*. Il terzo, che concludeva il percorso mettendo a tema *La Chiesa*, apparve nel 1900. Il libro, che trovò un ampio consenso nel pubblico, fu ristampato nel 1925 dall'editrice Cogliati in un volume unico,

¹⁰ G. Bonomelli, *Il giovane studente istruito nella dottrina cristiana*, vol. 1, Brescia, Tip. del Pio istituto, 1871; Id., *Il giovane studente istruito e difeso nella dottrina cristiana*, vol. 2, Brescia, Tip. del Pio istituto Pavoni, 1872; Id., *Il giovane studente istruito e difeso nella dottrina cristiana*, vol. 3, Modena, Tip. Immacolata Concezione, 1874.

¹¹ «Si deve sottolineare, inoltre, la particolare attenzione che egli ebbe per la catechesi e la pastorale giovanile, come pure la puntualità nell'illustrare le "ragioni della fede" a confronto con le ideologie e i movimenti culturali dell'epoca» *Lettera del Santo Padre Giovanni Paolo II a Mons. Giulio Nicolini, Vescovo di Cremona*, in *Un'eredità feconda e impegnativa. Il vescovo Geremia Bonomelli ottant'anni dopo. Atti delle celebrazioni*, cit., p. 14.

¹² Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 1, pp. 16-17.

¹³ Id., *Seguiamo la ragione*, Milano, Cogliati, 1925, pp. 143-144.

¹⁴ *Ibid.*, p. 1.

¹⁵ Nella recensione proposta dalla «Rassegna Nazionale», bene si coglieva il senso del volume: «Si deve tornare alla Religione, si grida da molte parti. È vero: ma alla Religione non si farà ritorno se non per mezzo della ragione». Cfr. P.R., *L'insegnamento della religione nelle scuole. A proposito di un libro di Mons. Bonomelli*, «Rassegna Nazionale», 1 gennaio 1895, pp. 3-11.

mentre nel 1951 fu la casa editrice Madella di Sesto San Giovanni a riproporre nuovamente i tre saggi.

L'interesse pedagogico del Bonomelli si manifestò in modo più esplicito nell'impegno per una radicale riforma dei metodi catechistici. A suo giudizio, la didattica tradizionale, troppo fondata sull'aspetto mnemonico, andava superata in direzione di una maggiore attenzione alle capacità e allo sviluppo dei fanciulli, incapaci, in tenera età, di comprendere concetti astratti senza un adeguato riferimento ai sensi e all'esperienza. Sostenne la necessità di modificare la stessa comunicazione delle verità cristiane con maggiore attenzione psicologica. In questa direzione andarono alcuni suoi volumi. Nel 1879 pubblicò un *Compendio della Dottrina Cristiana o Nuovo Catechismo Diocesano* rivolto ai bambini delle prime tre classi elementari. Con lo stesso intento, curò poi le già citate *Lezioni fondamentali per le Scuole Superiori di Religione*, pubblicate a Torino nel 1894¹⁶, la *Lettera pastorale sull'istruzione catechistica con appendice di altre norme utili per il clero* (1905), il saggio *Seguiamo la via piana e sicura* (1908) e il discorso sul *Catechismo*, pubblicato nelle *Conferenze vitali edite ed inedite* (1920).

Su queste tematiche, Bonomelli divenne uno dei principali punti di riferimento per il mondo cattolico¹⁷. Non fu perciò un caso se il vescovo di Piacenza, il suo amico Giovanni Battista Scalabrini, lo invitò ad intervenire al primo congresso catechistico celebratosi nella sua città tra il 24 e il 26 settembre 1889¹⁸, riservandogli il discorso di chiusura¹⁹.

Negli anni successivi, mostrò una certa intransigenza nel reclamare la rivoluzione dei metodi. A riguardo colpisce la scelta assunta durante i lavori che precedettero la compilazione del *Compendio catechistico lombardo-piemontese*. Coinvolto nella commissione preparatoria deputata alla stesura di

¹⁶ G. Bonomelli, *Lezioni fondamentali per le scuole superiori di religione*, Torino, Tip. e libreria Salesiana, 1894.

¹⁷ Dall'analisi della sua bibliografia sorprende soprattutto il «perdurante consenso a livello di Chiesa locale, diocesi e parrocchie italiane, per l'utilizzo che i suoi scritti hanno ricevuto nell'arco di un secolo, soprattutto nel campo catechistico e della divulgazione religiosa». Rosoli, *Introduzione*, in Fappani, Rosoli, *Bibliografia bonomelliana*, cit., p. 7.

¹⁸ Sul Congresso si vedano gli *Atti e documenti del Primo Congresso Catechistico tenutosi in Piacenza nei giorni 24, 25, 26 settembre 1889*, Tip. Tedeschi, Piacenza, 1890. Rimandiamo anche a U. Gianetto, *Mons. G. B. Scalabrini precursore del movimento catechistico*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo, Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 173-202. Si veda anche L. Pazzaglia, *Educazione e scuola nel programma dell'Opera dei congressi*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società dell'Italia unita dalla legge Casati al centro-sinistra*, Brescia, La Scuola, 2001, p. 114; C. Saggiocco, *Una nuova scuola di religione nelle parrocchie. «Il catechista cattolico» (1876-1905)*, in L. Caimi, G. Vian (edd.), *La religione istruita nella scuola e nella cultura dell'Italia contemporanea*, Brescia, Morcelliana, 2013, pp. 61-92.

¹⁹ *Atti e documenti del Primo Congresso Catechistico tenutosi in Piacenza nei giorni 24, 25, 26 settembre 1889*, cit., pp. 224-236.

un nuovo catechismo per le diocesi delle due regioni²⁰, si oppose alla volontà di apportare solo poche modifiche a testi precedenti anziché riscriverlo daccapo. Convinto che si stesse perdendo l'opportunità di rilanciare la catechesi con nuovi e più efficaci metodi, Bonomelli decise di dimettersi dalla commissione preparatoria²¹.

Altre indicazioni sulle posizioni catechetiche di Bonomelli giungono da un ulteriore episodio. Durante i lavori di preparazione del *Catechismo della dottrina cristiana* (1912), poi conosciuto come il catechismo di Pio X, il vescovo di Cremona fu scelto come uno dei quarantotto consultori incaricati di valutarne le bozze. Con una lettera del 21 novembre 1911, fu invitato ad esprimere un giudizio sulla prima versione. Nella relazione e nella lettera accompagnatoria inviata a Roma il 6 gennaio 1912, diede una valutazione abbastanza severa del testo²². A suo giudizio, il catechismo proposto era troppo lungo, data l'età dei futuri lettori. I suoi contenuti, poi, si sarebbero dovuti limitare a «verità più ovvie e più necessarie alla vita religiosa e morale». «La materia - scrisse - è ancora troppo *teologica*, e perciò non sempre possibile ad essere assimilata dal popolo e dai fanciulli. Bisognerebbe tornare alla semplicità del Vangelo; bisognerebbe che ci contentassimo delle verità più ovvie e più necessarie alla vita religiosa e morale». Lasciando da parte cautele diplomatiche, sintetizzò: «Non è lavoro pedagogico». In questo senso, propose di prepararne «uno completamente nuovo, meno arido, meno teologico, più razionale, più adatto alle esigenze dei tempi e alla capacità dei fanciulli e del popolo».

Le posizioni di Bonomelli colpirono a tal punto che lo stesso Pio X scrisse di suo pugno sulla lettera inviata dal vescovo di Cremona: «Da tenerne conto a preferenza di tutti»²³.

3. *Scuola laica?*

Furono tuttavia la situazione della scuola italiana e la sua legislazione a sollecitare riflessioni e proposte legate alle preoccupazioni pastorali e politiche del Bonomelli²⁴.

²⁰ Cfr. L. Nordera, *Il Catechismo di Pio X. Per una storia della catechesi in Italia (1896-1916)*, Roma, LAS, 1988, pp. 63-94.

²¹ *Ibid.*, p. 68.

²² L. Vigna, Mons. Bonomelli Catechista, «La Scuola Cattolica», n. 67, 1939, pp. 684-700; Nordera, *Il Catechismo di Pio X. Per una storia della catechesi in Italia (1896-1916)*, cit., pp. 505-509.

²³ *Ibid.*, pp. 381-382.

²⁴ J. Bur, *Stato e Chiesa di fronte alla scuola*, Milano, Vita e pensiero, 1962, p. 349.

Oltre a sensibilizzare su una serie di temi educativi e pedagogici le varie personalità del «mondo legale» che incontrava²⁵, Bonomelli si adoperò in più di una occasione per influenzare i lavori parlamentari dedicati alla normativa scolastica²⁶. A riguardo, va segnalato il suo impegno nella realtà di Cremona, dove sin dal suo arrivo operò per influenzare l'amministrazione comunale affinché dalle scuole non fosse escluso l'insegnamento religioso²⁷, distinguendosi però, per la sua condotta transigente e dialogante nei confronti delle autorità civili²⁸.

Gran parte delle sue opere sono disseminate di richiami e considerazioni sulla realtà dell'istruzione italiana. Già ne *Il giovane studente* dedicò ampio spazio ai dibattiti intorno all'insegnamento religioso nelle scuole statali e alla più generale situazione degli istituti²⁹. Con più organicità raccolse le sue riflessioni nella pastorale per la Quaresima del 1888, intitolata *La scuola laica*³⁰. Il piccolo libretto trovò in poco tempo larga fortuna, apprezzato anche da Leone XIII³¹, fu ripubblicato nel 1903 e nel 1910³², con echi anche successivi³³.

La pastorale è introdotta dalla trattazione di alcune questioni pedagogiche preliminari. In particolare, Bonomelli approfondì l'importanza dell'ambiente nella formazione della personalità, del necessario accordo tra educazione e istruzione, che, seppur «distintissime», dovevano rappresentare due vie «inseparabili», ma sottolineò anche come la scuola rappresentasse un punto nevralgico per i destini del paese, soprattutto per quanto atteneva il futuro della religione cristiana. In questo senso, presentò la questione della «scuola laica» come un tema fondamentale sul piano politico e religioso, che i cattolici non potevano lasciare in secondo piano.

²⁵ Tra gli altri, colpisce il rapporto con Luigi Credaro. Cfr. Bellò, *Geremia Bonomelli: con documenti inediti*, cit., p. 105; P.A. Carozzi, *La storia delle religioni dell'Università italiana*, in F. De Giorgi, N. Raponi (edd.), *Rinnovamento religioso e impegno civile in Tommaso Gallarati Scotti*, Milano, Vita e Pensiero, 1994, p. 263.

²⁶ Cfr. Gallina, *Il problema religioso nel risorgimento e il pensiero di Geremia Bonomelli: con documenti inediti*, cit., p. 4.

²⁷ Cfr. C. Bellò, *Mons. Bonomelli e l'azione sociale dei cattolici cremonesi*, «Bollettino per l'Archivio del movimento sociale dei cattolici italiani», n. 1, 1972, pp. 5-32.

²⁸ C. Betti, *Religione a scuola tra obbligo e facoltatività (1859-1923)*, Firenze, Manzuoli editore, p. 37.

²⁹ Si veda in particolare il diciassettesimo trattenimento del terzo volume intitolato: «Che cos'è la scuola laica?» e l'Appendice «Sulla istruzione separata dalla religione». Cfr. Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, pp. 194-214; pp. 503-507.

³⁰ Id., *La scuola laica: pastorale per la quaresima 1888*, Cremona, Tipografia dell'istituto Manini, 1888.

³¹ Bellò, *Geremia Bonomelli: con documenti inediti*, cit., p. 105; Id., *Geremia Bonomelli vescovo di povera santa Chiesa*, cit., p. 226.

³² G. Bonomelli, *Questioni religiose, morali e sociali del giorno*, Roma, Desclée, 1903, vol. 1, pp. 205-261; Id., *La scuola laica*, Roma, Desclée, 1910.

³³ Tra gli altri, fu citato nel noto libro di G. Monti, *La libertà della scuola, principi, storia, legislazione comparata*, Milano, Vita e Pensiero, 1928, p. 671.

A suo giudizio, la legislazione scolastica italiana era stata condizionata negli ultimi decenni da quello che definiva il «soffio del secolo», vale a dire la tendenza, proveniente specialmente dalla Francia, a bandire qualsiasi richiamo confessionale dall'insegnamento, nel segno di una radicale laicizzazione della scuola pubblica.

Bonomelli non approfondiva le tappe di questo percorso. Si limitava a considerare e difendere, in linea con una comune interpretazione di una parte del mondo cattolico, la validità della legge Casati che prevedeva la presenza dell'insegnamento religioso tra le discipline della scuola elementare, una disposizione che sosteneva fosse da considerare ancora in vigore e non abrogata dai provvedimenti successivi sul tema come le circolari Correnti e la legge Coppino.

Ma più che sui dibattiti politici o legislativi, l'attenzione del Bonomelli si concentrò soprattutto sulle conseguenze pedagogiche di una scuola senza religione. Stando al Bonomelli, una simile ipotesi era innanzitutto impraticabile: «*Scuola neutra o laica!* È dessa possibile in pratica? Nel maestro si può ottenere questa rigorosa *neutralità* od *indifferenza* per tutto ciò che riguarda la religione? Il solo pensarlo è un sogno. [...] Sarebbe più facile camminare sopra una corda senza cadere che osservare la *neutralità* religiosa nella scuola»³⁴. Con molto realismo, ricordò come, di fatto, su questi temi tutto dipendesse dall'orientamento dell'insegnante.

A suo giudizio, eliminare qualsiasi riferimento alla dimensione religiosa nella didattica quotidiana significava «insultare» la stessa intelligenza. «Il silenzio del maestro - osservò - equivale non solo ad una negazione, ma ad uno sdegnoso disprezzo della ragione, come il non scoprirsi il capo, né inchinarsi dinnanzi ad un gran personaggio, è fargli ingiuria»³⁵.

In modo analogo, bandire dalla scuola il nuovo testamento e la storia di Gesù Cristo significava disconoscerne l'influsso decisivo esercitato sulla storia occidentale. Per difendere il valore pedagogico della sua figura, Bonomelli arrivò a citare perfino la *Vita di Gesù* del razionalista Ernest Renan, nella quale il filosofo e storico francese sostenne come l'esistenza umana del Cristo rappresentasse un esempio insuperabile sul piano morale³⁶.

Secondo il vescovo di Cremona, inoltre, il principio della neutralità andava considerato «disonorante» sul piano strettamente educativo, poiché promuoveva una ignavia destinata a formare uomini incapaci di scegliere, senza carattere, e

³⁴ Bonomelli, *La scuola laica*, cit., pp. 71-72.

³⁵ *Ibid.*, p. 73.

³⁶ «'Nessun mortale ti potrà mai superare, dicea rivolto a Gesù Cristo un troppo famoso incredulo, morto non è molto. Mille volte più vivo, mille volte più amato dopo la tua morte che nei giorni di tua vita terrena, tu sarai la pietra angolare dell'umanità per guisa, che strappare il tuo nome dal mondo, sarebbe come scollarlo fino alle fondamenta' di questo uomo meraviglioso, unico, come lo salutava chi l'avea scoronato della aureola della divinità, nella scuola laica non si potrà più pronunciare il nome? È una follia!» *Ibid.*, p. 13.

quindi inutili per la patria³⁷. Il neutralismo, stando al prelado lombardo, nato per difendere la libertà, in realtà la sviliva, poiché negava agli alunni un punto di riferimento stabile sul quale sviluppare la propria intelligenza e la propria morale.

A chi sosteneva che gli alunni potessero essere meglio formati sul piano religioso anche fuori dalla scuola, Bonomelli replicò richiamando il principio dell'unità nell'educazione: la possibile schizofrenia tra le due istituzioni educative avrebbe condotto a nefande conseguenze per i bambini, divisi tra l'ateismo della scuola e la fede della famiglia. «Questa lotta tacita - spiegava -, ma evidente e profonda tra la scuola laica, la famiglia e la Chiesa, è fatale, dannosissima a tutti, fomentatrice del dubbio e del disprezzo contro ogni autorità, e perciò immorale e antisociale»³⁸. Si tratta di aspetti già evidenziati ne *Il giovane studente*³⁹. Secondo il vescovo, poi, tale ipotesi era profondamente contraria al vero senso della religione, che per sua natura riguardava qualsiasi dimensione della conoscenza e della esistenza⁴⁰.

Una ulteriore tesi, cioè quella di chi sosteneva la scuola laica per rispettare tutte le religioni, era considerata ipocrita da Bonomelli: «Il silenzio assoluto - osservò - le offende tutte. [...] Col pretesto di rispettare tutte le religioni, le sbandite tutte dalla scuola per sostituirvi la vostra religione, che è quella di non averne alcuna; la religione della irreligione!»⁴¹.

Secondo il vescovo di Cremona, la promozione della scuola laica perorata da una parte del ceto dirigente liberale era animata da una più profonda avversione contro la fede cristiana⁴². Non a caso, il vescovo lombardo, in diversi suoi scritti, oltre a lamentare l'assenza dell'insegnamento religioso nelle scuole⁴³, associò la dilagante apostasia della gioventù italiana con la frequenza delle scuole secondarie di Stato⁴⁴.

Ribadendo l'ufficio educativo della scuola⁴⁵, sostenne che una formazione priva di fondamenti religiosi fosse incapace di indicare principi morali stabili. Il riferimento alla ragione naturale era debole per giustificare un'etica spendibile sul piano educativo, soprattutto quando si aveva a che fare con i figli del popolo. Tanto meno potevano rappresentare un punto di riferimento morale l'istinto sociale o l'obbedienza alle leggi del Regno. A riguardo, aborrisce la possibilità che i principi etici potessero essere stabiliti «a maggioranza» ed

³⁷ *Ibid.*, p. 48.

³⁸ *Ibid.*, p. 46.

³⁹ Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, pp. 199-200.

⁴⁰ *Id.*, *La scuola laica*, cit., p. 61.

⁴¹ *Ibid.*, p. 60.

⁴² *Ibid.*, p. 80.

⁴³ Si veda anche G. Bonomelli, *Cause della miscredenza moderna e rimedi*, in *Id.*, *Questioni religiose, morali e sociali del giorno*, cit., vol. 1, p. 17.

⁴⁴ Si vedano le considerazioni nella pastorale *La famiglia*, in *Id.*, *La famiglia*, in *Id.*, *Questioni religiose, morali e sociali del giorno*, cit., vol. 2, p. 368.

⁴⁵ *Id.*, *La scuola laica*, cit., p. 24.

imposti con qualche «manuale ministeriale»⁴⁶. Contro simili ipotesi, ricordò, come l'ancoraggio dell'educazione morale alla religione fosse un assunto riconosciuto anche da pensatori lontani dal mondo cattolico.

A titolo d'esempio, e in linea con una prassi apologetica consueta, riprese le parole di molti autori non cattolici. Citò George Washington, quando scrisse che «la ragione e l'esperienza non ci permettono di credere, che la *morale possa aver vigore se si distingue dai principi di religione*»⁴⁷. Riportò a sostegno delle sue tesi passi di Victor Hugo, Nicolò Tommaseo e Massimo D'Azeglio, e ricordò come Diderot usasse insegnare il catechismo a sua figlia. Riportò poi anche le considerazioni di Victor Cousin, il quale, inviato in Prussia dal primo ministro François Guizot nel 1840 per studiarne il sistema scolastico, sostenne che uno degli aspetti più efficaci della scuola tedesca fosse la centralità della religione nella formazione dei giovani. Intorno a questi temi, Bonomelli fece riferimento infine anche al fortunato testo di Augusto Alfani, *Il carattere degli italiani*, che si era lungamente occupato della questione⁴⁸.

Molto significativo appare il riferimento ad un saggio del pedagogista Aristide Gabelli, uscito su la «Nuova Antologia» e citato ne *Il giovane studente*. Nell'articolo, non a caso ripreso poi anche dalla «Rassegna Nazionale»⁴⁹, lo studioso veneto aveva affermato che

l'utilità civile di educare nelle popolazioni il sentimento religioso non può essere posta in dubbio. Essa ha un'immensa potenza civilizzatrice, perché ha il segreto di comandare in nome delle speranze più care e dei più indefettibili bisogni umani, che nessuno al mondo è in grado di soddisfare al pari di lei, e parla al principe lo stesso linguaggio che al mendicante, e penetra nel tugurio non meno che nella reggia. Introducete adunque nelle scuole l'istruzione religiosa, ponete in questa risolutamente e realmente il fondamento dell'educazione sociale, e formerete cittadini che congiungeranno alla coltura della mente la fermezza dell'animo e la sommissione al dovere, gente operosa e intraprendente, ma coraggiosa appunto perché convinta ed onesta⁵⁰.

Simili considerazioni, espresse da un autore «non sospetto», erano riprese dal Bonomelli per mostrare il trasversale consenso intorno alla presenza della religione nella scuola, di cui ormai era convinta almeno una parte non secondaria del cosiddetto mondo laico. In questo senso Bonomelli commentava: «È dunque fuori d'ogni dubbio, anche per coloro che non sono cattolici, il cardine della costumatezza essere la religione, e questa doversi ispirare e coltivare dai genitori, e quindi nelle scuole, che sostituiscono i genitori stessi»⁵¹, anche se

⁴⁶ *Ibid.*, p. 28.

⁴⁷ *Ibid.*, p. 39.

⁴⁸ *Ibid.*, p. 42.

⁴⁹ Cfr. P. Sabbatini, *L'istruzione religiosa nella scuola elementare*, «Rassegna Nazionale», I e 16 febbraio 1908, pp. 272-275.

⁵⁰ Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, pp. 507.

⁵¹ *Ibid.*

poi il modo concreto di garantire l'insegnamento religioso non approdava a soluzioni unanimemente condivise.

La scuola laica era così considerata impossibile di fatto, dannosa per la formazione religiosa, e quindi, secondo il Bonomelli, nefasta per la morale di tutta la società: «Un sistema d'istruzione e di educazione radicalmente *anticristiano* ed *ateo* - scrisse ancora in *La scuola laica* - rovescia dalle fondamenta ogni morale e perciò prepara giorni nefasti alla società, che per sua sventura l'accoglie e fa suo»⁵².

Ai docenti della scuola laica non restava perciò che scegliere tra «questi due partiti: o rinunciare alla speranza e perfino alla possibilità di *istruire* per *educare* e avviare gli scolari sul sentiero della virtù, o riprovare e abbandonare il programma della scuola, dalla quale è stato esiliato Dio, Gesù Cristo, Chiesa e ogni religione. Dico ogni religione, perché anche una religione falsa fornisce una base, sia pur debole, su cui collocare il dovere e il principio morale. Meglio una religione falsa che nessuna religione: la *scuola laica* non vuole alcuna religione [...] Nella *scuola laica* il maestro potrà insegnare egregiamente a leggere, scrivere e far conti; potrà insegnare la grammatica, la ginnastica, il canto, il disegno, tutto ciò che volete; potrà in una parola *istruire*, ma *educare* giammai»⁵³.

Nel criticare il laicismo scolastico, Bonomelli si teneva estraneo dalle esagerazioni di taluni ambienti cattolici che, ad esempio, guardavano con diffidenza i processi di alfabetizzazione. Una scuola immorale rischiava tuttavia di produrre mali peggiori dell'analfabetismo⁵⁴. Rispetto ad una educazione destinata a scristianizzare il popolo, considerava dunque addirittura preferibile l'assenza di scuola⁵⁵. «La Chiesa – sintetizzò Bonomelli – ama l'istruzione per tutti, ma immune da errori e pericoli»⁵⁶.

⁵² Bonomelli, *La scuola laica*, cit., p. 13.

⁵³ *Ibid.*, p. 30.

⁵⁴ *Ibid.*, p. 35.

⁵⁵ «La scienza e l'istruzione diffusa in mezzo al popolo e fino nelle classi più diseredate è certamente un bene, ma non iscevro da pericoli e può diventare un male, come un'arma micidiale in mano d'un fanciullo, o di chi non sa debitamente maneggiarla. Che l'istruzione sia data a tutti, al povero popolo, ma che non sia disgiunta dall'aroma della morale e quindi dalla Religione, affinché lo preservi dalla corruzione: che questo popolo apprenda ciò che è vero, buono ed utile, ma che non sia avvelenato da dottrine perverse, che scuotono le basi della sua fede e della sua morale: che esso anzi tutto conosca la divina sua origine, i suoi eterni destini, la via ed i mezzi per raggiungerli, cioè l'adempimento de' suoi doveri verso Dio, verso sé stesso, verso la famiglia, verso la società» G. Bonomelli, *Il clero e la società moderna*, in Id., *Questioni religiose, morali e sociali del giorno*, cit., vol. 1, p. 273.

⁵⁶ *Ibid.*

4. «*Rispetto assoluto della libertà e dei diritti del padre di famiglia*»

Secondo il vescovo lombardo, la laicizzazione scolastica non teneva conto della prerogativa educativa della famiglia poiché disconosceva la volontà della gran parte dei genitori, perlopiù cristiani, di far frequentare ai loro figli una «scuola pubblica morale, religiosa e cristiana»⁵⁷. «I genitori - precisò - cristiani e cattolici, mandando alla scuola pubblica i loro figli, hanno il sacrosanto diritto, che vi siano istruiti ed educati nella propria religione, cristiana, cattolica. Fare altrimenti è offendere e calpestare il diritto dei genitori»⁵⁸.

Come già ampiamente approfondito in altre opere, sostenne che i governi dovevano essere al servizio del popolo, e non viceversa. A riguardo, scrisse: «Rispettiamo i diritti dello Stato e amiamo la patria; è dovere di tutti; ma lo Stato e la patria rispettino i diritti primi e più sacri della famiglia e dei genitori e sappiano che la grandezza e prosperità pubblica derivano dal rispetto religioso a quei diritti e che assorbirli tutti in se stessi è una tirannia detestabile. Lo Stato vien dopo la famiglia ed è creato per vegliare alla tutela dei diritti della famiglia, non per confiscarli a proprio diritto»⁵⁹.

Ricalcando argomenti molto comuni tra i cattolici italiani e francesi impegnati sul tema, sottolineò la contraddizione del ceto dirigente liberale, che in campo scolastico non sembrò essere conseguente con i propri principi. Da una parte, infatti, imponeva una linea etica alla scuola, sradicandone la sua natura religiosa e calpestando la libertà educativa delle famiglie, dall'altra consolidò un sistema scolastico monopolistico⁶⁰. Si tratta di contraddizioni già evidenziate ne *Il giovane studente*⁶¹.

Di questi argomenti, trattò anche nella pastorale del 1893, intitolata *La famiglia*. Dopo aver sottolineato l'importanza che i giovani venissero «affidati a mani industri, che ne coltivino la mente e ne formino il cuore», sostenne che questo fosse «un diritto e più che un diritto è un dovere dei genitori»⁶². A suo giudizio, gli «istruitori ed educatori, preparati ed offerti dalla società, non sono, né possono essere che rappresentanti dei genitori e continuatori del loro ufficio sotto la direzione e la responsabilità dello Stato, che è creato per dare soccorso a tutte le debolezze e provvedere a tutti i bisogni pubblici, per difendere, non per assorbire, i diritti dei privati»⁶³.

Nella richiesta di tutela del diritto educativo delle famiglie il vescovo lombardo portava la sua coerenza fino a riconoscere lealmente il diritto

⁵⁷ Bonomelli, *La scuola laica*, cit., p. 55.

⁵⁸ *Ibid.*, pp. 56-57.

⁵⁹ *Ibid.*, p. 58.

⁶⁰ *Ibid.*, p. 62.

⁶¹ Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 2, p. 442.

⁶² *Id.*, *La famiglia*, cit., p. 363.

⁶³ *Ibid.*, p. 364.

di scelta per tutti, compresi i non cristiani⁶⁴. A tal proposito così annotava: «I dissidenti dalla dottrina cattolica si riducono ad un numero piccolissimo e nella maggior parte delle scuole di campagna non esistono affatto. Che se vi sono, si provveda, rispettando la volontà dei genitori e siano dispensati dall'insegnamento religioso; ciò è giusto e necessario»⁶⁵. E ancora: «Vi sono genitori che non la vogliono? Sia rispettata la loro volontà e ai loro figli non si dia. Ragiono bene e da vero liberale?»⁶⁶.

Sul tema richiamava l'esempio di nazioni come la Germania e la Svizzera, entrambe divise tra cattolici e protestanti, nelle quali durante le due ore di insegnamento religioso gli studenti potevano frequentare le lezioni impartite da docenti della propria confessione⁶⁷. Richiamò inoltre l'esempio di altri paesi europei, che gli apparivano molto più «civili» dell'Italia⁶⁸. In particolare fece riferimento all'ordinamento olandese e statunitense, nei quali per rispettare la molteplicità delle numerose confessioni degli alunni e delle loro famiglie, durante le ore di religione erano insegnati alcuni principi religiosi comuni: un sistema che a Bonomelli, almeno in linea di ipotesi, sembrava addirittura accettabile per quei paesi⁶⁹.

5. Scuola statale confessionale e timori per la libertà d'insegnamento

Se molti degli argomenti del vescovo di Cremona appaiono simili a quelli di altri autori cattolici dell'epoca, la sua posizione si distinse soprattutto per il pieno riconoscimento della potestà governativa intorno all'indirizzo, il funzionamento e la gestione della scuola. Nella sua opera, insomma, non vi è traccia di quella retorica ostile e diffidente verso l'azione dello Stato in campo educativo e scolastico. La sua preoccupazione è invece concentrata sulla necessità di una caratterizzazione confessionale degli istituti governativi.

⁶⁴ Citando il cardinale Manning, ricordò: «In nome della legge del paese, i parenti hanno il diritto imprescrittibile di esigere che i loro figli siano educati conformemente ai loro principi religiosi e alle ispirazioni della loro coscienza». E poi proseguì «I liberi pensatori, gli eretici, gli israeliti, che vi sono tra noi (e grazie a Dio sono in piccolissimo numero) non vogliono la istruzione religiosa per i loro figli? Non l'abbiano e sia rispettata la loro libertà, come quella dei cattolici o non cattolici, che la vogliono. Questa sembra a noi l'unica soluzione ragionevole del problema, il rispetto assoluto della libertà e dei diritti del padre di famiglia. Lo Stato e il Municipio si limitano ad accertare lealmente i voti delle famiglie e ad assicurarne l'adempimento: è questo il loro diritto, diremo meglio, il loro dovere» Bonomelli, *La scuola laica*, cit., p. 67.

⁶⁵ *Ibid.*, pp. 77-78.

⁶⁶ Bonomelli, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, p. 201.

⁶⁷ Cfr. *Id.*, *La scuola laica*, cit., p. 68.

⁶⁸ *Ibid.*, p. 69.

⁶⁹ *Ibid.*, pp. 77-80.

Nella visione del Bonomelli, la scuola rappresentava il possibile luogo di incontro tra gli interessi della nazione e quelli della religione. Proprio nel campo educativo emergeva la necessità di una nuova alleanza tra la Chiesa e lo Stato per il bene del popolo italiano. In questo senso andarono i richiami di Bonomelli al profondo valore patriottico dell'insegnamento religioso. «Nella Religione – spiegava – non potete ignorarlo, vi è una forza per formare i caratteri, per istillare nel cuore sensi generosi, lo spirito di sacrificio, per temprare gli animi a forti propositi e al vero patriottismo: la fibra del popolo si scuote tutta allorché il nome della patria si unisce quello della religione; separarli è opera irragionevole e antipatriottica, e voi non potete, voi non dovete farlo».

Contro la presunta separazione tra sentimento religioso e patriottico, ricordò poi: «Noi, uomini di Chiesa, non siamo nemici da combattere, ma amici da accogliere; siamo alleati che offriamo le nostre forze lealmente senza secondi fini, al servizio della patria comune; perché non accettarle? Noi non rimproveriamo, non vogliamo offendere chicchessia, meno poi ancora qualsiasi Autorità pubblica: la dobbiamo rispettare per coscienza: noi soltanto preghiamo e ardentemente preghiamo affinché i nostri fanciulli crescano nel santo timore di Dio, informati agli eterni principi del Vangelo di Gesù Cristo, che fu, è e sarà sempre fonte d'ogni virtù, base di ogni progresso e codice d'ogni vera civiltà»⁷⁰.

Riguardo alle competenze statali sull'istruzione e l'educazione, riconobbe il diritto della «competente autorità» ad approvare gli insegnanti delle scuole private⁷¹. Si trattava, tuttavia, di una supervisione che non sembrava accettare per l'insegnamento religioso. Ne *Il giovane studente*, infatti, sostenne che questa disciplina e i suoi insegnanti dovessero essere gestiti direttamente dalla Chiesa, senza intromissioni “civili” e statali⁷². Inoltre, nel saggio *Cause della miscredenza moderna e rimedi*, invitò i sacerdoti a esaminare le attività delle scuole statali «fin dove vi è consentito dalle condizioni dei tempi e dei luoghi»⁷³. Riprendendo le considerazioni già esposte nel suo intervento al Congresso catechistico di Piacenza, sottolineò l'importanza di affidare l'insegnamento della religione a sacerdoti e religiosi⁷⁴, criticando quanti li volevano estromettere a priori dalle scuole pubbliche⁷⁵. Contemplò tuttavia la possibilità che questa disciplina fosse insegnata da docenti laici, purché la scuola non fosse più “laica”⁷⁶.

⁷⁰ *Ibid.*, p. 85.

⁷¹ *Ibid.*, pp. 64-65.

⁷² *Id.*, *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, p. 507.

⁷³ *Id.*, *Cause della miscredenza moderna e rimedi*, cit., p. 28.

⁷⁴ *Id.*, *La scuola laica*, cit., p. 65.

⁷⁵ Si veda anche *Id.*, *La questione sociale è questione morale*, in Bonomelli, *Questioni religiose, morali e sociali del giorno*, cit., vol. 2, p. 146.

⁷⁶ «Se non volete il sacerdote nella vostra scuola per insegnare la religione, fatela insegnare dai vostri istitutori laici e la scuola cesserà d'essere laica. Perché, per una diffidenza non giustificata verso tutti i sacerdoti, escludere con essi e per essi la religione? Se nutriste un sospetto fondato che uno de' vostri maestri abusi dell'insegnamento della ginnastica, della grammatica, della storia, voi licenziereste certamente il maestro, ma non sbandireste mai dalla scuola né la ginnastica, né la

Sulla questione della libertà di educazione, qui intesa come riconoscimento e valorizzazione degli istituti non statali, le proposte del vescovo appaiono invece tiepide. Sul tema, non possono che colpire le posizioni assunte nella risposta all'inchiesta promossa dalla rivista «Studium» riguardo alla citata battaglia applicata al sistema universitario, nella quale Bonomelli espresse forti timori sul piano pratico, poiché temeva che certe congregazioni, inadatte a questo compito per la loro mediocrità scientifica, potessero approfittare di questa occasione per fondare nuove università di scarso livello⁷⁷.

Anche ne *La scuola laica*, più che rivendicare pari diritti (anche economici) per gli istituti non statali, il vescovo lamentava che i genitori fossero costretti ad iscrivere i figli nelle scuole cattoliche, vista la presenza di insegnanti irreligiosi. Riferendosi ai genitori cattolici, precisò: «Se voi li forzate a mandare i figli alle scuole private, li costringete a pagare due volte. È giustizia? - Hanno intera la libertà di mandare i figli alle scuole private! No, non è libertà quella di poter aver una scuola, pagandola, quando avete lì una scuola dove non si paga. La libertà, la vera libertà, non deve essere un oggetto di lusso. E se vi possono essere alcuni cittadini, capaci di pagare una scuola privata, avete voi il diritto di obbligarli a questa spesa?»⁷⁸. Su questo punto risaltano anche le posizioni espresse nel sedicesimo capitolo de *Il giovane studente*, intitolato «Doveri dei genitori verso dei figliuoli quanto al corpo e quanto allo spirito. Istruzione, esempio, sorveglianza, correzione, preghiera per essi». Qui Bonomelli spiegò come i genitori cristiani avessero il dovere di iscrivere i propri figli nelle «pubbliche scuole» per avere un'istruzione civile. Solo nel caso in cui i maestri di queste scuole non fossero adeguati all'istruzione religiosa dei figli, i genitori potevano iscriverli in istituti dove vi insegnavano docenti autenticamente cristiani⁷⁹.

Va comunque ricordato che nella sua concreta azione pastorale incentivò la fondazione di scuole non statali, e in altri passi delle sue opere incoraggiò i sacerdoti e i laici a sostenerle⁸⁰.

6. Bonomelli e le posizioni scolastiche di Fogazzaro e Gallarati Scotti

Sulla base di quanto emerso, appare abbastanza definita la differenza delle sue tesi con quelle sostenute dal circuito modernistico lombardo, dalla Lega

grammatica, né la storia. Perché per odio del prete cacciare la religione dalla scuola?» Id., *La scuola laica*, cit., p. 81.

⁷⁷ Cfr. L. Pazzaglia, *Scuola e religione nell'Italia giolittiana*, Milano, ISU, 2000, pp. 187-188.

⁷⁸ Bonomelli, *La scuola laica*, cit., p. 64.

⁷⁹ Id., *Il giovane studente istruito e difeso nella dottrina cristiana*, cit., vol. 3, pp. 183-184.

⁸⁰ In *Cause della miscredenza e rimedi*, invitò i sacerdoti «a fondare scuole schiettamente cattoliche, ed aiutare quelle che sono già fondate; invogliate i genitori, quando si possa, a mandarvi i loro figli» Id., *Cause della miscredenza moderna e rimedi*, cit., p. 28.

Democratica, e da due suoi stretti amici come Antonio Fogazzaro e Tommaso Gallarati Scotti. Com'è noto, il primo, durante la discussione della Legge Orlando (1904) e nel dibattito che ne seguì, si dichiarò favorevole ad escludere l'insegnamento del catechismo cattolico dalle discipline della scuola elementare. Propose invece di mettere a disposizione delle famiglie due ore dell'orario scolastico allo scopo di consentire, per chi lo volesse, l'istruzione religiosa dei figli. Questa doveva essere impartita preferibilmente dai sacerdoti, ma comunque fuori dagli istituti statali. Nello stesso tempo, sostenne però che l'insegnamento etico-civile fosse integrato da un'educazione ai comuni principi delle varie confessioni e che tutta l'educazione fosse ispirata ad una più generale dimensione religiosa della morale⁸¹. Ancora più radicali apparvero le tesi esposte da Tommaso Gallarati Scotti, il quale era convinto che occorresse abbandonare qualsiasi rivendicazione intorno all'ora di religione nelle scuole statali, per puntare sia ad una effettiva libertà d'insegnamento sia ad una riforma dei programmi delle secondarie e delle università più aperti alla cultura religiosa⁸².

Come è facile notare, le tesi del vescovo appaiono, almeno per quanto attiene la battaglia per la «confessionalizzazione» della scuola pubblica, molto più vicine, per quanto non sovrapponibili, a quelle prevalenti nel circuito intransigente⁸³, poi ereditate dall'Unione popolare cattolica italiana⁸⁴.

Per questa ragione, stupisce l'apprezzamento, già evidenziato da Luciano Pazzaglia⁸⁵, con cui Bonomelli, in una lettera del 18 agosto 1909 indirizzata ad Antonio Fogazzaro, commentò le pagine inviategli dallo scrittore vicentino, che avrebbero poi introdotto il noto *pamphlet* di Tommaso Gallarati Scotti, *Insegnamento catechistico e cultura religiosa nella scuola italiana*⁸⁶. In questo breve libretto, il nobile milanese riassume le sue posizioni sul tema, dopo i vari confronti su carta stampata con il marchese Filippo Crispolti e l'implicita condanna delle sue posizioni espressa dal cardinal Ferrari.

⁸¹ Cfr. A. Majo, *Una polemica sull'insegnamento religioso nella scuola, protagonisti il Card. A. C. Ferrari, F. Crispolti e T. Gallarati Scotti*, in *Cultura scuola e società nel cattolicesimo lombardo del primo Novecento, Atti del convegno di studio, Brescia, 24-25 novembre 1979*, Ce.Doc., Brescia, 1981, pp. 163-172; E. Butturini, *La religione a scuola. Dall'Unità ad oggi*, Queriniana, Brescia, 1987, pp. 33-36; C. Betti, *Sapienza e timor di Dio. La religione a scuola nel nostro secolo*, La Nuova Italia, Firenze, 1992, pp. 20-22; Pazzaglia, *Scuola e religione nell'Italia giolittiana*, cit., pp. 32, 76-84, 123-162.

⁸² G. Chiosso, *Gentile, i cattolici e la libertà d'insegnamento nei primi anni del Novecento*, in G. Spadafora (ed.), *Giovanni Gentile. La pedagogia. La scuola*, Roma, Armando Editore, 1997, pp. 306-309; Pazzaglia, *Scuola e religione nell'Italia giolittiana*, cit., pp. 38; 163-207.

⁸³ Cfr. L. Pazzaglia, *Educazione e scuola nel programma dell'Opera dei Congressi* e R. Sani, *I periodici scolastici dell'intransigentismo cattolico*, in Pazzaglia, Sani (edd.), *Scuola e società dell'Italia unita dalla legge Casati al centro-sinistra*, cit. pp. 87-126 e pp. 127-169.

⁸⁴ Cfr. C. Ghizzoni, *Cattolici, educazione e scuola nei primi anni dell'Unione popolare (1906-1909)*, «History of Education & Children's literature», vol. 9, n. 1, 2014, pp. 603-634.

⁸⁵ Pazzaglia, *Scuola e religione nell'Italia giolittiana*, cit., p. 192.

⁸⁶ T. Gallarati Scotti, *Insegnamento catechistico e cultura religiosa nella scuola italiana. con prefaz. del sen. Antonio Fogazzaro*, Torino, Segretariato della Lega D.N., 1909.

Nella lettera citata, Bonomelli si complimentò con il Fogazzaro per la sua prefazione, che stando al vescovo di Cremona, aveva «posto la questione da tanto tempo e con tanto accanimento dibattuta in tanta luce, che l'ha senz'altro sciolta». Confermò quindi Fogazzaro nelle sue posizioni, sostenendo che «volere l'insegnamento del Catechismo da parte dello Stato, come in passato, è volere l'impossibile, l'assurdo, il danno e la ruina dell'insegnamento stesso: è volere la dipendenza dallo Stato in materia religiosa e quale materia!». Osservò poi che il libretto di «Tommasino», non ancora letto, sarebbe sicuramente stato in ogni parte «misurato»⁸⁷.

In realtà, l'idea che l'insegnamento della religione non fosse competenza dello Stato, ma della Chiesa, non escludeva che negli istituti pubblici si insegnasse il catechismo. Bastava infatti che questo fosse insegnato e supervisionato dal clero. Ad ogni modo, l'incoraggiamento per l'azione dei due, non può che apparire contraddittoria rispetto alle posizioni emerse sulla questione dell'insegnamento religioso in tutte le sue opere ma anche rispetto alle riserve, ampiamente note, di Bonomelli nei confronti degli ambienti modernisti e della Lega Democratica. Sfortunatamente, nell'epistolario non c'è traccia di ulteriori commenti riguardo alla *querelle* che aveva visto protagonisti il marchese Crispolti, Fogazzaro e Gallarati Scotti.

Può forse essere utile per approfondire la questione, rileggere con più attenzione la prefazione inviata dallo scrittore vicentino al Bonomelli. In queste poche pagine, solo sei, Fogazzaro sostenne che le sue posizioni nascevano da una valutazione intorno alla qualità dell'insegnamento religioso impartito nelle scuole statali che non gli sembrava molto lontane da quella dei più «illuminati» intransigenti, i quali, nelle «conversazioni private» ammettevano che la sua presenza negli istituti pubblici avesse portato dei frutti «nulli o tristi», dato che «i laici non sono generalmente adatti a professarlo» e che la «loro ignoranza, il loro scetticismo possono fare grandi guasti nell'animo dei fanciulli». Si tratta di una posizione espressa a più riprese anche da Bonomelli⁸⁸.

⁸⁷ Cfr. *Corrispondenza Fogazzaro Bonomelli, a cura di C. Marcora*, Milano, Vita e pensiero, 1968, pp. 256-257; Pazzaglia, *Scuola e religione nell'Italia giolittiana*, cit., p. 190.

⁸⁸ Va evidenziato che, affrontando la stessa questione, nel suo *pamphlet*, Gallarati Scotti sembra fare riferimento, ma senza nominarlo per «ragioni di delicatezza», allo stesso vescovo di Cremona quando spiegò il vero significato del catechismo e criticò quelli in uso. Rivolgendosi direttamente al marchese Crispolti scrisse: «Ella mi parla del catechismo come di una raccolta di formule discese dal cielo e che possono per una loro quasi magica virtù gettare luce nelle coscienze di chi le ha imparate con esattezza. Noi pensiamo invece, e un vescovo cattolico venerato ci aiuta ad esprimere il nostro pensiero, che 'le definizioni del catechismo sono degli enigmi: possono illuminare degli spiriti già maturi; ma non spiegano che *obscurum per obscurius* a spiriti impreparati'. Ella ritiene che questo libro sia come la pietra fondamentale dell'educazione religiosa; noi non sappiamo considerarlo che come una semplice guida o come un indice che può servire al maestro cristiano indicandogli le conclusioni teologiche a cui deve giungere». Due pagine dopo, nel criticare i catechismi in uso, scrisse: «È precisamente questo orientamento verso il Cristo che nel catechismo attuale manca. Non lo dico io - badi bene - lo dice uno che ha una grande autorità nella Chiesa e che per ragioni di delicatezza non nomino. Nel catechismo attuale Nostro Signore in qualche modo scompare»

Secondo Fogazzaro, la situazione era aggravata dal fatto che questo insegnamento dipendesse dalle maggioranze comunali, che, in linea di ipotesi, potevano far insegnare questa disciplina anche a docenti non cristiani o atei. Di fronte a questa situazione, lo scrittore vicentino sosteneva con una certa risolutezza che occorresse superare un simile stallo, ma al momento di proporre una soluzione alla questione che fosse coerente con la difesa del «principio», e cioè il valore della religione nell'insegnamento, le sue proposte appaiono più indeterminate.

Basta leggere un lungo passo della sua prefazione che riportiamo interamente: «L'insegnamento della verità religiosa ha valore d'insegnamento fondamentale e quindi logica vuole che sia impartito da maestri eccellenti, e quando l'autorità civile dice ai cattolici: scegliete voi questi maestri eccellenti e mandateli ad insegnare nelle mie aule che io vi apro, avrà essa fatto danno alla religione o avrà invece aiutato ad attuare il famoso principio? Lo so, l'autorità civile poteva far meglio, sottrarre l'argomento ai dibattiti degli ottomila Consigli comunali d'Italia, poteva dire: questa è la regola che in ogni Comune i Cattolici facciano insegnare la religione nelle scuole comunali dai maestri che piacerà loro eleggere. Ma infine lo stato attuale delle cose è proprio questo che in ogni Comune i cattolici hanno tale facoltà. L'autorità civile poteva anche dire: - I vostri maestri di religione li pagherò io - e allora i più feroci conservatori avrebbero applaudito alla riforma, perché non potrebbero domandare di più a un governo che avesse a capo il marchese Crispolti. L'autorità civile non lo ha detto. Non lo avrebbe detto neppure Niccolò Tommaseo. Io, per verità, lo avrei detto perché l'uomo di Stato deve riconoscere nella Religione una necessità pubblica, far sì che possa venire debitamente insegnata dovunque, anche alle popolazioni più povere; ma poi non mi può dispiacere che i miei correligionari si paghino il catechismo che si comperino così, nella scuola di religione, un'assoluta indipendenza dall'autorità civile, che si mostrino capaci di sacrifici pecuniari per la loro fede. E un nuovo stato di cose che noi dovremmo accettare con gioia, deliberati a servirci delle leggi per dare all'istruzione religiosa sviluppo ed efficacia ben maggiori di quelli ch'ebbe fino a ieri. «Tocca a noi insegnare religione» mi diceva un giovine prete concorde con me nel desiderare l'abolizione dell'insegnamento religioso di Stato. Sì, tocca a voi, preti, insegnare la religione e tocca a tutti noi, cattolici, far sì che la scuola libera di religione diventi un vero focolare di spiritualità religiosa dove si evangelizzino i fanciulli, dove si faccia una fervida propaganda delle idealità più educatrici, dove il sapere attinto alla scuola laica si ordini alla glorificazione della Verità suprema»⁸⁹.

In questa prefazione, Fogazzaro sembra quindi auspicare come ipotesi «migliore» che lo Stato lasci ai cattolici il controllo dell'insegnamento della

Gallarati Scotti, *Insegnamento catechistico e cultura religiosa nella scuola italiana. con prefaz. del sen. Antonio Fogazzaro*, cit., pp. 11-12.

⁸⁹ *Ibid.*, pp. 3-5.

religione, ma preferisce poi, forse pensando ad una più probabile attuazione, prospettare l'organizzazione e la gestione di queste discipline agli stessi cattolici fuori dall'orario scolastico.

Tornando alla lettera del Bonomelli, sembra difficile che il suo encomio possa essere ricondotto ad un netto cambio di opinione sul tema. Al riguardo non sembra un caso che, nel pubblicare la relazione del Gallarati Scotti al Congresso della Lega Democratica svoltosi a Rimini nel settembre del 1908, la redazione della «Rassegna Nazionale», sulla quale è nota l'influenza del Bonomelli, dichiarò di non condividere tutte le idee lì espresse⁹⁰.

In conclusione, appare forse più plausibile che la lettera rappresenti una ulteriore manifestazione di quella carità intellettuale con cui Bonomelli era solito incoraggiare l'amico Fogazzaro, sorvolando sovente su quegli aspetti ambigui o contrari al magistero, che, com'è noto, non passavano inosservati alla Santa Sede.

Conclusione

Un primo sondaggio sulle posizioni di Bonomelli intorno alle questioni educative e scolastiche ha confermato la grande attenzione del vescovo di Cremona per l'istruzione e la formazione delle giovani generazioni. Questo interesse si profuse nell'impegno per un radicale innovamento dei metodi educativi, ma anche nell'attenzione per la legislazione scolastica.

In questo campo, il sentimento conciliatorista del vescovo di Cremona trovò applicazione nella difesa dell'imprescindibile ruolo dello Stato per l'istruzione e l'educazione del popolo. Molto lontano dall'atteggiamento protestatario tipico di certi ambienti intransigenti, il vescovo di Cremona anticipò quella piena accettazione dell'azione statale, anche in materia scolastica, che si diffuse negli ambienti legati all'Opera dei Congressi solo all'inizio del nuovo secolo.

Bonomelli prefigurava una generale alleanza tra l'istanza nazionale e la Chiesa cattolica, che sul piano scolastico si traduceva nella richiesta di una riforma della scuola in senso confessionale. Molto meno sentita appare invece la questione della libertà d'insegnamento, intesa come rivendicazione di un sistema scolastico plurale e rispettoso degli istituti non statali. Le posizioni del vescovo appaiono poi assai diverse da quelle degli amici Fogazzaro e Gallarati Scotti. A suo giudizio, infatti, il regime di separazione tra Chiesa e Stato non doveva tradursi in una estromissione del catechismo dalle scuole pubbliche, sebbene chiedesse che a tutti i genitori, compresi quelli non cristiani, venisse garantita la prerogativa sull'educazione religiosa dei figli.

⁹⁰ T. Gallarati Scotti, *La separazione della Chiesa dallo Stato e i suoi rapporti col problema della scuola*, «Rassegna Nazionale», 16 novembre 1908, pp. 128-143.

Spells and the microscope. Picture books about fairies: fantasy, science and children's literature

William Grandi
Department of Education «G.M.
Bertin»
University of Bologna (Italy)
william.grandi@unibo.it

ABSTRACT: This article examines some important children's picture books about fairies, from the Victorian era to modern times, from a historical, pedagogical, graphic and literary point of view. In the past two centuries this editorial genre of children's literature has been little investigated. Writers and illustrators – including Cicely Mary Barker, Sophie Reinheimer, Maria Savi-Lopez, Wil Huygen and many others besides – have told stories of fairies, angels and sprites, using narrative models borrowed from popular traditions, botany and the observation of nature. Examining these books in their historical succession, a constant and – at times – conflictual relationship emerges between fairies and technical and scientific development. Industrialisation and biological discoveries have not deleted these legendary figures from the collective imagination. On the contrary, fairies have transformed, to become a strong and rebellious presence that is not afraid of microscopes and cameras, nonchalantly brushing even with evolutionary and anthropological theories. Over the decades, children's books about fairies have become a narrative sector of particular interest, not only for children's literature but indeed also for the history of cultural and social customs.

EET/TEE KEYWORDS: Children's Literature; Fairies; Science; Technology; Illustrations; XIXth-XXth Centuries.

Introduction: fairies in popular tradition, knightly literature and scientific classification

This article sets out to examine the many children's books which, from the 19th century onwards, have told of and classified the characteristics and habits of fairies and other enchanted creatures from the world of «Little

People», from a historical-pedagogical as well as a graphic and literary point of view. For centuries, these magical characters have been found in fairytales, legends and other cultural works, but from the 19th century they took on new characteristics, also following the hopes and fears that biological, technological and anthropological research of the time aroused in the popular imagination. This article therefore analyses the connections between fairies and science in children's literature, as well as the educational content found in some books about fairies destined for young readers.

Applying the logical and scientific concept of classification to unreal entities like fairies is a paradoxical task. Indeed, one of the fundamental tasks of scientific research is the classification of living beings, rocks, physical or atmospheric events, chemical molecules or any object or event which, contrary to fairies and sprites, is concrete, measurable and observable. Despite this, many authors have tried to classify fairies, imitating the anthropological, botanical and zoological cataloguing methods used by scientists.

The most renowned biological classification is undoubtedly that of Carl Linnaeus, an eminent 18th century Swedish scientist. Linnaeus is remembered for the first successful modern botanical and zoological classification, identifying every creature with a Latin nomenclature which is still used today by biologists¹ and which, as we will see, is imitated by many authors of children's books about fairies. In fact, classification is so important for human thought that, over the centuries, the rational act of giving order to the world according to criteria of similarity, shape and structure has even been applied to angels, demons, gods, dreams and many other unreal and fantastic things. It is therefore not unusual that someone, perhaps to entertain young readers, may also have thought of classifying fairies: this article is therefore an opportunity to investigate this specific field of literature and illustrations for children, which has as yet been rarely touched by academic studies.

Fairies appeared in Western literature towards the end of the Roman Empire when, in some lines of the complex book *De nuptiis Philologiae et Mercurii* [*On the Marriage of Philology and Mercury*] composed by Martianus Capella, fairies are indicated as «Fatue» and set alongside «Fatui» – perhaps their male counterparts – along with Fauns, Satyrs and Nymphs². However, it was only between the 12th and 13th centuries that fairies began to play a key role in European literature: to celebrate the figure of the knight, poets of the time did not use the cultural models of the Church but rather sought inspiration among popular tradition, where fairies were very important figures³. From many points

¹ W. Coleman, *Biology in the Nineteenth Century*, Cambridge, Cambridge University Press, 1977; italian transl. *La biologia nell'Ottocento*, Bologna, il Mulino, 1984, p. 11.

² M. Capella, *De nuptiis Philologiae et Mercurii-Le nozze di Filologia e Mercurio*, (Book II, 171), Milan, Bompiani, 2001, p. 95.

³ L. Harf-Lancner, *Le fées au Moyen Age. Morgane et Mélusine. La naissance des fées*, Paris, Edition Champion, 1984, italian transl., *Morgana e Melusina. La nascita delle fate nel Medioevo*,

of view, the fairies of popular tales and knightly poems were the descendants of the ancient Fates which, according to mythology, wove people's destinies (the Latin word «fata», «fairy» is the plural of «fatum» i.e. «fate»). But they were also the representation of extraordinarily beautiful women, skilled in bewitching men. Still today, fairies in children's stories have these two characteristics: they often have a profound influence over the fate of their wards (like Pinocchio's Fairy), but are also able to evoke quite explicit erotic dimensions: just think of the *Winx Club* fairies, seductive teenagers with revealing cleavages whose adventures have been told successfully in many cartoons since 2004⁴.

1. *Portraits of fairies*

Fairies have always inhabited - and indeed still inhabit - stories and legends. However, in Great Britain from 1840 onwards they found hospitality in paintings and drawings. As art scholar Christopher Wood states, around the 1840s the Victorians decided to «desperately» believe in fairies, as they represented an escape from the intolerable scientific and materialistic age they lived in⁵. Indeed, in 1853 even Charles Dickens prophesied that a nation without fantasy, without respect for fairytales, would never hold a great place under the sun⁶. And indeed the interest for fairies was a consistent part of Victorian romanticism, which needed wonderful tales of fantasy: from 1840 to 1870 circa, this need for wonder was expressed in the paintings of fairies and sprites⁷. In the late 18th century William Blake painted images of fairies borrowed from the Shakespearian comedy *A Midsummer Night's Dream*⁸. But it was above all the Pre-Raphaelites who perfected this theme: today, the works of painters such as Robert Huskisson (1819-1891)⁹, Richard Dadd (1819-1886)¹⁰ or Joseph Noel Paton (1821-1901)¹¹ are still the cornerstones of fairy-inspired iconography. These artistic creations showed graceful, winged fairies, and profoundly influenced subsequent artistic productions. Today, the fairies imagined by Victorian artists are still the models used by many illustrators to represent these magical creatures. Wood then stated that from 1870 onwards, Victorian society began to adopt the fantastic iconography of fairies in children's

Turin, Einaudi, 1989, pp. XI-XV.

⁴ S. Salvemini, *La grande magia. Farò volare le Winx in borsa (e in Cina)*, «Corriere della Sera - L'Economia», 3 July 2017.

⁵ C. Wood, *Fairies in Victorian Art*, Woodbridge, Suffolk, Antique Collectors' Club Ltd, 2008, p. 8.

⁶ *Ibid.*

⁷ *Ibid.*, pp. 8-16.

⁸ *Ibid.*, p. 20.

⁹ *Ibid.*, pp. 70-73.

¹⁰ *Ibid.*, pp. 74-85.

¹¹ *Ibid.*, pp. 86-97.

literature: from that moment on, these enchanted creatures and their illustrated representations became almost the exclusive prerogative of children's books and their illustrators¹², although with some interesting exceptions. Obviously, illustrations of fairies for children can also be found before the 1870s, but it was above all from that decade onwards that fairies became the privileged domain of childhood. Why did fairies shift from art for adults to illustrations for children? This is a significant question in pedagogical terms. The answer perhaps lies in an ingenious intuition of Tolkien, author of *The Lord of the Rings*: the English writer found that not only the old furniture that adults didn't like anymore passed from the lounge to the nursery, but also the stories that adults themselves found to be no longer to their taste¹³. In the 1870s, photomechanical processes were introduced that made it immensely easier to produce and print illustrated works, including children's books¹⁴. As children's books had maintained a close relationship between text and illustration for a long time, this technological innovation represented an important development for children's publishing of the time, facilitating the work of later 19th century illustrators.

But there were exceptions, and in fact not all fairies ended up in children's books after 1870: significant in this respect are the greetings cards for adults by William Stephen Coleman (1829-1904)¹⁵, representing exotic settings with scantily clothed maidens, similar to fairies or nymphs, with dreamy-eyed gazes suggesting naive sensuality.

Again in Victorian times, the illustrations of fairies destined clearly for children underlined the childish tenderness and purity of these magical creatures, drawn with chubby cheeks, big eyes and innocent expressions. Richard Doyle (1824-1883)¹⁶ and Eleanor Vere Boyle (1825-1916)¹⁷ were among the main children's illustrators of fairies of the era: theirs are images of a magical, peaceful world reconciled with nature, where fantastic creatures innocently play and laugh. Richard Doyle and Eleanor Boyle's magical creatures live among lush green plants, thus underlining the proximity between sprites and nature.

It is probable that ideas and prejudices of childhood always lie behind the various graphic representations of fairies. Coleman's dreaming nymph-fairies, for example, appear to have much in common with the photographs of girls taken by Lewis Carroll more or less around the same time¹⁸. With his

¹² *Ibid.*, pp. 8-15.

¹³ J.R.R. Tolkien, *On Fairy-Stories*, in idem *Tree and Leaf*, London, George Allen & Unwin Ltd, 1964; italian transl., *Sulle fiabe*, in *Albero e Foglia*, Milan, Rusconi, 1992, p. 50.

¹⁴ G. Oveden, *Nymphets & Fairies*, London, Academy Editions, New York, St. Martin's Press, 1976, p. 6.

¹⁵ *Ibid.*, pp. 8-31.

¹⁶ *Ibid.*, p. 41.

¹⁷ *Ibid.*, p. 71.

¹⁸ G. Celati (ed.), *Alice disambientata: materiali collettivi (su Alice) per un manuale di sopravvivenza*, Milan, Edizioni L'Erba Voglio, 1978, pp. 109-111.

photographs, the creator of Alice in Wonderland sought to capture the elusive, melancholic and ambiguous essence of childhood in the Victorian era, and we find the same essence in Coleman's illustrations. On the other hand, Richard Doyle and Eleanor Boyle's girl-fairies and mischievous elves suggest an idea of serene, innocent childhood playing carelessly in an eternal present.

2. *English fairies: tradition, literature and nature*

Although fairies belong to popular legends of many civilisations, they entered the culture of the cultured, aristocratic classes for the first time in Great Britain. Fairies not only interested Shakespeare and his audiences, but were also used by many other British scholars, including Edmund Spenser, an important Elizabethan poet who was much loved at court¹⁹. According to the writer Peter Ackroyd, the British imagination has paid close attention to fairies throughout its age-old cultural history, due to the close relationship that has always existed between nature and the spirituality of the people. In the most authentic British traditions, nature is described as if animated by spiritual creatures living in trees²⁰. Moreover, Ackroyd considers one of the characteristic features of his country's culture to be its attention to detail and to miniatures. The English people show a love for delicate, calm, regular, flowing, winding lines; in his opinion, these characteristics can be found throughout the artistic history of his country²¹. Tolkien himself also recognised the love for delicate detail that appears time and time again in British art in the smallness of English fairies²². Therefore, a love of nature and a taste for beautiful things seems to justify the abundance of small fairy-like creatures in books for both adults and children printed in Great Britain.

Let us, for example, analyse *Puck and Blossom. A Fairy Tale*²³, one of the first examples of children's books describing the habits and customs of the «Little People». This small book was published in 1875: it was written by the Irish author Rosa Mulholland (1841-1921) and illustrated by the English illustrator Catherine «Kate» Greenaway (1846-1901). Even the title of the book is linked to the British literary tradition of stories about fairies: Puck is the name of the famous sprite of English folklore and a character in Shakespeare's comedy *A Midsummer Night's Dream*. The name Blossom clearly recalls flowers and

¹⁹ Schweikert H.C., Inglis R.B. *et al.*, *Adventures in English Literature*, New York-Chicago, Harcourt, Brace and Company, 1931, pp. 963-964.

²⁰ P. Acroyd, *Albion. The Origins of the English Imagination*, London, Vintage Books, 2004, pp. 3-7.

²¹ *Ibid.*, pp. 84-87.

²² Tolkien, *On Fairy-Stories*, cit., p. 16.

²³ R. Mulholland, *Puck and Blossom. A Fairy Tale*, London, Marcus Ward & Co., 1875.

nature, to which fairies are closely bound. Rosa Mulholland's book tells the story of a boy named Puck and a girl named Blossom who live near one another in a pretty countryside valley. One summer's day, the two friends play a game, talking to the greenery in the woods and inviting the fairies to come and live with them. Apparently the invitation goes unheard: so the children play, forgetting all about the offer made to the invisible fairies²⁴. But the place where the two friends live borders on a magical kingdom beyond a stream running through the flowery meadows and a wood. The fairies don't always stay on their side of the river, and that's how some of them heard the children's invitation. Attracted by these enchanting words, they run to tell the other members of their families²⁵. And so the wonderful adventures of Puck and Blossom begin: they are taken to the fairyland, where they learn to tell the difference between the customs, characters and behaviour of the various fairy tribes. After the good fairies win a battle over the mischievous goblins, with the help of the birds, the two children are crowned with flowers and accompanied by a festive procession of magical creatures²⁶.

The coloured illustrations show the two children in different moments of their adventures: each drawing is framed with a garland of mushrooms, birds, flowers, insects and tiny sprites with childish and grotesque, yet always happy faces. The idyllic rural setting of the story suggests an ideal contrast between the beautiful countryside and the greyness of Victorian industrial society. This illustrated story is a forerunner of many elements we will find in later children's books on the same topics.

3. *Scientists, theories and fairies*

Again in Victorian times, the great interest in fairies coincided – perhaps not by chance – with the spread of the scientific ideas of Charles Darwin²⁷: during a long trip around the world, the famous English naturalist made many scientific observations and gathered many samples of living beings he gleaned clues from in order to formulate his theory of the evolution of the species. According to this theory, living creatures develop and differentiate through slow, gradual and random variations of their biological characteristics, generation after generation. These variations – when they offer positive resources responding to the demands of the natural environment – make the species more competitive in the struggle for survival. Darwin explained his theory in an essay that was

²⁴ *Ibid.*, pp. 9-11.

²⁵ *Ibid.*, pp. 11-12.

²⁶ *Ibid.*, pp. 127-128.

²⁷ On Darwin's theories see: Coleman, *Biology in the Nineteenth Century*, cit., pp. 81-90.

destined to change the course of scientific research forever: his book *On the Origin of Species*, published in 1859²⁸, incited strong debate immediately, even among the general public²⁹. Many aspects of Darwin's discoveries generated worry: one of the most famous elements of debate was that indicating the human race as descending from hominid primates; another aspect related to the fact that mutations in living beings are random³⁰ and therefore do not imply any divine intervention: according to the English biologist's theory, matter has found its own way of reaching consciousness, with no supernatural assistance.

Fairies were also part of the debate on Darwin's theory, entering the argument precisely with the issue of human evolution starting from inferior hominids. Between the late 19th and early 20th century several British scholars speculated that the last descendants of primitive human races could still survive in remote parts of Europe: they also imagined that these people were short in stature, like dark pygmies, strange and coarse in appearance. It was believed that these populations hid in their caves in secluded valleys, showing themselves increasingly rarely and – with their fleeting apparitions – fuelling belief in the existence of fairies. This enthralling hypothesis is known as the «*Turanian Theory*», the name given by some scholars to this supposed people (the *Turians*)³¹. This idea profoundly influenced British literary culture between the late 19th and early 20th century. According to literature scholar Carole G. Silver, the *Turanian Theory* left its mark in the illustrations of Aubrey Beardsley (where here and there we find characters similar to pygmies), in some pages of Oscar Wilde (just think of the dwarf in *The Birthday of the Infanta*) and in many pages of H. G. Wells and Arthur Conan Doyle. But it was above all the horror story writer Arthur Machen (1863-1947) who specifically used the *Turanian Theory* in his pages³²: in one of Machen's most distressing tales, fairies are described as barbaric, deformed creatures who threaten and then spirit away an honest ethnology professor conducting research on primitive races in a remote part of the English countryside, where the force of nature seems to obliterate the defences of civilisation³³.

Moreover, according to Darwin's theory, no divine intervention is required to allow the evolution of the species: this means that theology, metaphysics and magic are banished from studies on nature. It is interesting to note however that in the same period many illustrators and writers described fairies as creatures with a special affinity with the world of flowers, plants and animals. From many

²⁸ J. William Schopf, *Cradle of Life. The Discovery of Earth's Earliest Fossils*, Princeton, Princeton University Press, 1999; italian transl. *La culla della vita*, Milano, Adelphi, 2003, p. 35.

²⁹ *Ibid.*, p. 365.

³⁰ *Ibid.*, p. 336.

³¹ C.G. Silver, *Strange and Secret People. Fairies and Victorian Consciousness*, Oxford, Oxford University Press, 1999, pp. 137-147.

³² *Ibid.*, pp. 139-146.

³³ A. Machen, *The novel of the Black Seal*, 1895; italian transl., *La storia del sigillo nero*, in Id., *Il Gran Dio Pan e altre storie soprannaturali*, Milan, Mondadori, 1982, pp. 96-133.

points of view, Victorian fairies seemed to hold a magic germinating power that helped living creatures to be born, grow and mature. Victorian fairies seemed to represent that living principle of nature without which it was impossible for many 18th and 19th century scientists to explain life. Indeed, naturalists who believed in vitalism – a current now stripped of all credibility – interpreted existence as the result of a vital force inside living creatures; this force was able to cause movement and growth within them³⁴, and this was a living principle that was independent of inorganic elements, chemical reactions and the randomness of evolution. Vitalism was a scientific perspective that could not be reconciled with Darwinism, which subsequently refuted and replaced it. As we will see, the ideas behind vitalism are often linked to fairies, even in recent books.

Finally, it is important to note that in the same period in which Darwin's science was making headway and in which fairies were making a comeback, many children's literature masterpieces were published, including Lewis Carroll's *Alice in Wonderland*. Darwin, the fairies and these great children's books gave voice to ideas, open-mindedness and possibilities rather than ultimate assertions³⁵. In other words, evolutionism, the «Little People» and *Wonderland* all shared a common feature of having thrown off the oppressive, dogmatic and hypocritical blanket of society governed by Victoria, by making recourse to science, fantasy or irony. Darwin, the great classics and fairies thus offered a fundamental contribution to changing minds and deleting the many rigidities of the official culture.

4. *Fairies and optical instruments*

Around 1830, British optician Joseph Jackson Lister perfected the microscope and transformed it into an indispensable instrument for scientific research. The ability of the microscope to reveal invisible worlds aroused great enthusiasm not only among scientists but also among the general public³⁶. And thus, in the Victorian era, some tales were inspired by the microscope and the wonders it revealed. *The Diamond Lens* is one of these stories, written by Irish author Fitz-James O'Brien in 1858. As explained by scholar Laura Forsberg, *The Diamond Lens* is a paradigmatic novella that traces a link between literature and science³⁷: Fitz-James O'Brien tells of the adventures of a mad scientist who develops an

³⁴ Coleman, *Biology in the Nineteenth Century*, cit., pp. 159-165.

³⁵ G. Grilli, *Bambini, insetti, fate e Charles Darwin*, in E. Beseghi, G. Grilli (edd.), *La letteratura invisibile. Infanzia e libri per bambini*, Rome, Carocci editore, 2011, pp. 26-27.

³⁶ J. Schickore, *The Microscope and the Eye. A History of Reflections 1740-1870*, Chicago, Chicago University Press, 2012, pp. 105-132.

³⁷ L. Forsberg, *Nature's Invisibilia. The Victorian Microscope and the Miniature Fairy*, «Victorian Studies», vol. 57, n. 4, 2015, pp. 638-666.

ultra-powerful microscope using a hundred-and-forty carat diamond lens. Using this incredible instrument, in a sample of water the scientist discovers a tiny, beautiful creature called a sylph: sylphs are legendary, enchanted beings with a light, delicate and sensual body. In the story, the scientist falls in love with the tiny creature. He becomes obsessed with the sylph's beauty but cannot communicate his love to her due to the difference in size between the two characters. Then the sylph dies, when the water in her tiny habitat evaporates under the lens: the scientist's desperate love and the scientific instrument with its powerful lens have killed the tiny creature. The microscope is used to access minute, invisible worlds and therefore seems the ideal instrument for offering an indiscreet view of the secret worlds of the tiny fairies: but it is also a merciless instrument, because by concentrating the light it also evaporates the liquid. *The Diamond Lens* metaphorically shows how technology penetrates the most hidden spaces of nature, yet threatens every wonder and every sentiment with death; however, this story also shows that in the era of the steam train and scientific biology, fairies were very much part of the collective imagination, even though they were increasingly small and increasingly threatened. Indeed, from many points of view, the existence of the fairies was a part of a lively debate at that time among a group of researchers who considered the imagination to be a hazard for the rational mind and other naturalists who saw fantasy as an indispensable part of true scientific curiosity³⁸.

Finally, it should be noted that not only the microscope but also the camera – another optical instrument that symbolised modernity – was used to explore the hidden world of the fairies. In 1917 two English cousins aged nine and sixteen, who lived in Cottingley in the Yorkshire countryside, told their parents they had seen some fairies nearby. One of the girl's father lent them his camera so that they could prove they weren't lying: the two cousins took some photographs showing tiny, delicate winged creatures gracefully dancing and prancing. These fairies looked exactly like the ones portrayed in Victorian illustrations. When the event was made public, strong debate arose between those who accused the cousins of faking the photos and those, including the famous author Arthur Conan Doyle, who believed the apparitions to be authentic³⁹. Here the fact that the Cottingley fairies were authentic or not is not important, what is interesting is rather the connection that exists between science, technique, fairies and childhood. A connection that is held together by fantasy.

³⁸ *Ibid.*, p. 662.

³⁹ A. Conan Doyle, *The Coming of the Fairies*, London, Hodder and Stoughton, 1922.

5. *The «Little People» beyond the English Channel*

The «Little People» were not confined solely to British books, but in a short time were also found in other works published in continental Europe. One of the first publications outside of the United Kingdom was *Fate e folletti* written by Maria Savi-Lopez (1846-1940), published in Italy in 1900⁴⁰. This volume describes, catalogues and classifies elves, sprites and other magical creatures from different Italian and European traditions, with particular attention to stories of Nordic and French origin, as well as Mediterranean, Slavish, Eastern and Mayan legends. At first sight it doesn't seem to be a book for children, indeed the author gives the original sources (ancient novels, Scandinavian sagas, popular fairytales) and provides historical and cultural details with great critical and literary rigour. In fact, the author had collaborated on some research works with Pitré⁴¹, the scholar who, with commendable effort, gathered and reconstructed a rich heritage of Sicilian folklore fairytales and traditions. However, Maria Savi-Lopez was also a children's author of talent, her adaptations of Nordic and Germanic mythology for children were published for several decades starting from the 1920s: to name one of the many examples, her book *Oberon, piccolo re selvaggio* was published in 1929 for the first time and remained in print until at least 1953⁴². The contents of Maria Savi-Lopez' children's books are often adaptations of the stories told in *Nani e folletti*. Indeed, *Nani e folletti* can also be enjoyed by young readers, because the style of the book is smooth and entertaining, just like the style of popular fairytales. In the book, the author distinguishes between the different species of magical beings, which are divided, for example, into «light elves», «earth gnomes», «enchanted blacksmiths», «sea sprites» and so on. The main merit of this small encyclopaedia on fairies was to connect distant traditions to each other, showing Italian readers – perhaps for the first time – the wealth of a vast narrative heritage which had been ignored by the academic culture for a long time.

Again in Italy between the 19th and 20th centuries, illustrator Carlo Chiostrì (1863-1939) was particularly renowned for his illustrations of fairytales and fairies. His drawings for children's books were brightly coloured with very accurate and detailed forms. Chiostrì's fairies partly resemble those drawn by English artists of the period: they are often winged and wear flowing tunics. However, Chiostrì represents these magical creatures as young women with mature, wise expressions; only rarely do child-like fairies appear in his illustrations. His illustrations show fairies and sprites in «Victorian» costumes,

⁴⁰ M. Savi-Lopez, *Nani e folletti*, Rome, Società Editrice Dante Alighieri, 1900; re-edition referred to: *Fate e folletti*, Palermo, Sellerio, 2002.

⁴¹ *Ibid.*, p. 16.

⁴² W. Grandi, *La musa bambina*, Milan, Unicopli, 2011, p. 203.

but their comportment mirrors Italian folklore traditions, where these magical creatures are described as judicious, mysterious, at times capricious, almost always adult, maternal figures⁴³.

Fairies, their vital energy and their bonds with the plant world also conquered German children's literature, and particularly the books by Sophie Reinheimer (1874-1935), not only a prolific and famous author but also an infant school teacher⁴⁴. One of her most famous books in German-speaking countries is *Bunte Blumen*⁴⁵, published for the first time in 1913, but constantly reprinted even recently. The first edition of the book was illustrated by the painter Carl (Karl) Alexander Brendel (1877-1945), an artist who mainly portrayed natural landscapes, popular scenes and animals. *Bunte Blumen* talks of plants, flowers, meadows and gardens with poetic sensitivity. The illustrations show winding branches and corollas that seem to portray human faces; other drawings show children sitting on branches or flying in the sky, inferring to the reader a possible correspondence between childhood, plants, fairies and angels. It is a sort of small botanical encyclopaedia, in which the description of nature and fantasy are the main ingredients of a story that mixes science and spirituality. The fact in 1921 that «Die Sozialistische Erziehung» («Socialist Education») – a monthly journal published by the Austrian association «Kinderfreunde» defending childhood – warmly recommended this book to introduce children to knowledge of the natural world, as the text suggests the need to learn to sympathise with plants, creating a bond between humanity and nature, makes us think⁴⁶. Another of Sophie Reinheimer's children's books is also worthy of analysis here: the illustrated book of poems *Im Blumenhimmel* published in 1929, and translated shortly afterwards also into Italian with the title *I fiori in paradiso*⁴⁷. The illustrations are by Else Wenz-Viëtor (1882-1973), considered by some to be the stylistic godmother of the famous contemporary illustrator Lisbeth Zwerger. Else Wenz-Viëtor's drawings show small angels who are in fact fairy-girls who care for the flowers, adorned with fragile wings and light dresses. In this story the flowers are dead and have gone to heaven among the soft clouds, having suffered on the Earth. In Sophie Reinheimer's poems, every plant tells its own story, it tells of its own torments and the reason for its own death: at times due to a lack of water, or an invasion of aphids, neglect by the owners or at the hands of pranksters who ruined the flowers as a game.

⁴³ To better understand Chiostrì's work, refer to the book by F. Tempesti, *Tra fate e nani. Il mondo incantato di Carlo Chiostrì*, Florence, Salani, 1988.

⁴⁴ M. Miels, H.H. Ewers, *Kinder- und Jugendliteratur. Von der Gründerzeit bis zum Ersten Weltkrieg*, Stuttgart, Philip Reclam jun, 1994, p. 500.

⁴⁵ S. Reinheimer, *Bunte Blumen*, Berlin-Schönberg, Franz Schneider Verlag, 1913.

⁴⁶ «Die Sozialistische Erziehung», vol. 1, n. 2, 15 May 1921, p. 23.

⁴⁷ S. Reinheimer, *Im Blumenhimmel*, Oldenburg, Verlag Gerhard Stalling, 1929; italian transl. *I fiori in paradiso*, Rome, Casa Editrice Mediterranea, undated. Some clues - the type of translation, the publishing quality, the state of conservation - help us to understand that the book must have been translated and published in Italy in the 1930s.

The book emanates a deep feeling of grief, fragility, sadness, even though the dead flowers are cared for by kind fairy-angels who offer crutches to an old, tatty cactus, bring water to thirsty plants, turn down the covers on the beds where the flowers rest and tie sticks to the bent stems of wilting corollas. Sophie Reinheimer's gardener fairies are redeemed angels, a moral metaphor of an educational commitment to raising children's awareness towards nature. US scholar Jack Zipes⁴⁸ stated that in Germany in the first three decades of the 20th century, children's books known as «Redemptive Tales» were very popular. In this narrative genre, an exceptional protagonist has magical adventures, displaying a brand of goodness and harmony which allows him to meet the standards and expectations of a conservative society. Relating to «Redemptive Tales», among the many German authors, Zipes mentions Waldemar Bonsels – creator of the Maya the Bee – and Sophie Reinheimer. Reinheimer's books always involve extremely good characters who bring order and serenity, where before disorder and anxiety prevailed. And this is exactly what her light, helpful and melancholic fairy-angels do.

6. *Someone is smiling in the meadow*

The progressive miniaturisation of fairies and their proximity to nature and childhood are all characteristics used by the Victorian collective imagination to represent the enchanted «other world» of the «Little People»: a hidden world but which seems close to our everyday dimension.

The most important interpreter of these collective imaginations was a sickly English girl. Illustrator Cicely Mary Barker (1895-1973)⁴⁹ came from a very religious upper middle class family with strong Victorian principles. Although as a girl she was often sick – as a child she was epileptic – in any case she managed to study illustration, encouraged by her father. This led to her develop an artistic style very close to the Pre-Raphaelite pictorial current⁵⁰.

Cicely Mary Barker's most important children's picture books are those dedicated to the flower fairies: from 1923 and at least until 1948 she illustrated many children's books on flowers throughout the seasons, where alongside every exquisitely drawn plant there is a tiny fairy, which is almost always a girl. Each illustration is accompanied by a short poem in rhyming couplets, describing the features of the plants illustrated. All the fairies have tunics and

⁴⁸ J. Zipes (ed.), *Fairy Tales and Fables From Weimar Days*, Madison-Wisconsin, The University of Wisconsin Press, 1997, p. 11.

⁴⁹ J. Martineau (ed.), *Victorian Fairy Painting*, London, Marrell Holberton, 1997, p. 71.

⁵⁰ *Introduction*, in C.M. Barker, *The Complete Book of the Flower Fairies*, London, Frederick Warne, 1997, p. 6.

wings of the same colour and shape as the plants they care for. And thus, Cicely Mary Barker created a great fairy encyclopaedia, to classify a botanical universe made not only of plants but also “guardian spirits” that allegorically represent the vital essence of the plants themselves. The expression “guardian spirits” was not coined by Cicely Mary Barker, but was introduced here by the author with the following thoughts: Cicely, a fierce Christian, would perhaps never have used this expression, which rings of paganism. And yet, the dainty fairies the English illustrator represented alongside the stems and corollas offer readers an image of a dreamlike, naturalistic idyll, close to the reveries of Neopagan groups that began to appear in the United Kingdom in the early 20th century⁵¹.

Cicely Mary Barker's graphic perfection is the result of the combination of her Pre-Raphaelite taste for the fantastic dream and scientific botanical drawing techniques (the author often visited Kew Gardens to draw plants from life). Once again, imagination and science, children and fairies mix together to bring a surprising tale of words and pictures to life. Cicely Mary Barker did not disappear when she died: her creations still reappear constantly today, often through commercial channels that sell her illustrations on children's cups, plates and placemats. Finally, in recent times Cicely's drawings were reworked to create picture books that «teach» us how to find the flower fairies⁵²: these are «guides» to the fairy world which deliberately remind of the charming antique style of the notebooks of 19th century botanists, ornithologists and explorers.

7. *The return of the fairies*

For a long time after the Second World War, fairies found hospitality in Western mass culture above all in Disney films and Fantasy books. However, from the period of «dissent» in the Sixties and Seventies – as scholar Alison Lurie explains⁵³ – fairies and the «Little People» reappeared unexpectedly. In those decades in the United States it was not uncommon to see bumper stickers saying «I brake for elves». This was the period of a kind of popular pixiolatry which never translated into a formal religion like traditional ones, but which became a kind of semi-official spirituality due to the desire of many young people to follow new sensations, and find alternatives to their parents' God. In other words, people believed, or make-believed in fairies, or wanted to believe in them as a kind of game, because their supposed existence made life not only

⁵¹ P. Jones, N. Pennick, *A History of Pagan Europe*, Abingdon-UK, Routledge – Taylor & Francis Group, 1995; italian transl. *Storia dei Pagani*, Bologna, Odoya, 2009, pp. 277-279.

⁵² C.M. Barker, *Fairyopolis. A flower Fairies Journal*, London, Penguin, 2005; C. M. Barker, *How to Find Flower Fairies*, Frederick Warne, London, 2007.

⁵³ A. Lurie, *Don't Tell the Grown-Ups*, Boston, Little, Brown and Company, 1990; italian transl. *Non ditelo ai grandi*, Milano, Mondadori, 1993, pp. 35-42.

more bearable, but helped to re-enchant the world. And a «re-enchanted» world once again became a place of revelations stolen from consumerism, technocracy and conformism. Thus fairies and sprites became a symbol of rebellion: this had partly already happened in the 19th century when – as explained before – artists portrayed the fantastic worlds of the fairies to express the collective need to escape the Victorian greyness.

Thus between the 1970s and 1980s many books were published– using an ironically encyclopaedic and scientific style – telling young generations of protesters about ancient traditions, in order to recognise, sight and classify the difference races of fairies and sprites, distinguishing them by customs, habits and particularities. Some of these – often richly illustrated – publications even taught how to sight these creatures. Books like the *Encyclopaedia of Fairies*⁵⁴ published by English fairytale and traditions scholar Katharine Briggs in 1976 and *A Field Guide to the Little People*⁵⁵ by Nancy Arrowsmith and George Moore published in 1977 opened the gates to the kingdom of the fairies, mixing the professionalism of studies on folklore with fun and transgression (above all with the many scatological and sexual references that sprites always carry). These books were often published in children's series, but were in fact read above all by adolescents and young adults⁵⁶.

The most important of these texts is most certainly *Leven en werken van de Kabouter*⁵⁷ from 1976: the book was written by Wil Huygen and illustrated by Rien Poortvliet. This richly illustrated book represented an authentic editorial phenomenon in the West, with many translations and re-editions, even very recently. It is a guide to social customs, everyday habits, traditions, biology and the behaviour of the tribe of gnomes: a precisely ordered encyclopaedia that examines the clothing, homes, courting and eating habits... and any other element that helps to define the gnomes' «civilisation». Leafing through the pages, reading the texts and looking at the illustrations we truly have the impression of holding a kind of guide, a research manual, an instruction book for recognising the traces of these little fantastic companions of humanity. The book clearly intends to talk about gnomes as if they really exist. A critical analysis of the book also confirms that it is a container of ecologist claims: in these pages it is easy to read the echoes of the Deep Ecology theory formulated by Norwegian philosopher Arne Næss, according to whom man must limit his impacts on nature as much as possible in order to respect other living beings inhabiting nature. Deep Ecology emerged in the early 1970s. The success of *Leven en werken van de Kabouter* paved the way for two other important

⁵⁴ K. Briggs, *Encyclopedia of Fairies*, New York , Pantheon Books, 1976.

⁵⁵ N. Arrowsmith, G. Moore , *A Field Guide to the Little People*, London, Macmillan, 1977.

⁵⁶ Lurie, *Don't Tell the Grown-Ups*, cit., pp. 36-38.

⁵⁷ W. Huygen (Text), R. Poortvliet (ill.), *Leven en werken van de Kabouter*, Bussum, The Netherlands, Unieboek Bv – Van Holkema & Warendorf, 1976.

«encyclopaedic» books on enchanted creatures, *Faeries*⁵⁸ in 1978 and *Giants*⁵⁹ in 1979. We must also consider that these books contained the works of some exceptional illustrators. *Faeries*, for example, was written and illustrated by Brian Froud as well as Alan Lee, who is now one of the most important illustrators of Tolkien's books. In *Faeries* the illustrators follow the tradition of the small creatures with insect wings we have already seen, even though they are presented in a new, surprising and in some respects disturbing manner. In this book the fairies are no longer innocent girls, they are no longer the guardian angels of nature. Here the fairies and sprites want to show off their bodies even more, displaying an adolescent, green, diaphanous and deliberately provocative nudity. In other words, these fairies are not only capable of casting spells but they are also able seducers. After all, after Freud, Nabokov and the «sexual revolution» the image of youth changed, and fairies – one of the possible representations of youth – also acquired less conventional characteristics.

8. *Seeking and classifying sprites in France*

The need to establish order in that intricate maze of enchanted stories and creatures was also satisfied in France by Pierre Dubois, illustrator and scholar of legends about the “Little People”. His first book on the topic of enchanted creatures was *La Grande Encyclopédie des Lutins* published in 1992⁶⁰, followed by *La Grande Encyclopédie des Fées*⁶¹ (1996) and *La Grande Encyclopédie des Elfes*⁶² (2003). All these books are illustrated by husband-and-wife team Claudine and Roland Sabatier: the two artists' illustrations are characterised by a particularly detailed yet light hand, with ironic, Pre-Raphaelite hues and sharp, deep, brilliant colours. The Sabatier's illustrations are evocative, merry, irreverent, and very well match Dubois' funny, fussy and erudite texts. This encyclopaedic trilogy is impressive for the accuracy of the descriptions of dozens and dozens of fantastic creatures taken from popular traditions, fairytales and highbrow literature: thus the author underlines the ubiquitousness of fairies, able to live comfortably as much among the coarse rags of shepherds as the soft velvets of kings. Another impressive aspect of this trilogy is the bibliographical structure behind Dubois' painstaking research to catalogue and describe such a complex imaginative universe: a universe of fantasies, by which humanity

⁵⁸ B. Froud, A. Lee (text and ill.), D. Larkin (ed.), *Faeries*, New York, Rufus Publications Inc., 1978.

⁵⁹ D. Larkin, (ed.), *Giants*, New York, Rufus Publications Inc., 1979.

⁶⁰ P. Dubois (text), C. & R. Sabatier (ills.), *La Grande Encyclopédie des Lutins*, Paris, Editions Hoëbeke, 1992.

⁶¹ Id (text), Id (ills.), *La Grande Encyclopédie des Fées*, Paris, Editions Hoëbeke, 1996.

⁶² Id. (text), Id. (ills.), *La Grande Encyclopédie des Elfes*, Paris, Editions Hoëbeke, 2003.

attempts to give a face to the unknown, to its own fears and hopes⁶³. In Dubois' learned pages, among the Sabatiers' brilliant miniatures, fairies and other magical creatures are classified with stubborn, ironic precision according to their habitat, their customs, dietary preferences and their relations with human beings. Dubois' books are modern bestiaries of fantastic beings that are as good as dead, but which on the contrary remain insolently among us. The tone of these pages reminds us very much of the ironically provoking bumper stickers of the 1970s that said «I brake for elves». Dubois, on the other hand, often claimed that sprites rightly belonged to the rebellious season of 1968⁶⁴, that season of change and insurrection, irreverence, freedom and youth which inspired the whole of Europe to rise up against conformism and gerontocratic powers not only in the West – May 68 in France – but also in Eastern Europe – the Prague Spring.

Like others we have investigated here, these books *look like* children's books: the colours, the layout, the graphic structure of the text and the drawings, the beauty of the illustrations are clearly intended for an audience of young readers. Yet the contents, the allusions, the subtle irony, the light-hearted transgressions are irresistible attractions also for adult audiences who have not lost touch with their inner child. Dubois and the Sabatiers tell stories that offer an escape from everyday greyness: indeed fairies are able to give a voice to those possible cultural alternatives that the conformism of the present aims to choke⁶⁵.

Again in France, worthy of mention is also *L'Herbier des Fées*⁶⁶ written and illustrated by Benjamin Lacombe – with the collaboration of Sebastien Perez – published in 2011. This children's book tells the story of a Russian scientist called Aleksandr Bogdanovich who, just before the First World War, went to the French region of Brittany to visit the famous Brocéliande Forest, which for centuries has been considered the site of many tales of King Arthur, Merlin the wizard, fairies and sprites. Aleksandr is a naturalist and was sent to the mysterious forest by Rasputin, to look for the ingredients of a herbal elixir of life. The picture book – like many others analysed here – appears as a scientist's notebook, containing data on the natural elements observed, as well as drawings of the plants and extraordinary creatures found in the forest. At first sober and detached, as the discoveries become gradually more surprising, the notebook is filled with emotions, noting wonders, poetic thoughts and strange scientific discoveries. In telling of Brocéliande Forest, it slowly unveils its mysteries, introducing the scientist to creatures seen for the very first time: these are tiny, graceful magical beings, diaphanous in appearance, similar to human

⁶³ A. Antoniazzi, *Romagna notturna*, Cesena, Il ponte vecchio, 2010, p. 119.

⁶⁴ See the interview given by the French author Pierre Dubois, available on-line at the following website <<http://www.fabyrinthe.com/dossiers/biographies/344-pierre-dubois>> (last access: 25.05.2017).

⁶⁵ C. Lomi, *Alle origini della fata*, Florence, Edizioni della Meridiana, 2004, pp. 166-167.

⁶⁶ B. Lacombe, S. Perez, *L'Herbier des Fées*, Paris, Albin Michel Jeunesse, 2011.

beings but also like plants and insects. Once again the wonderful creatures that appear are a hybrid of plant life, yet also remind of elegant spiders, tiny birds, gentle insects. Also in this case the fairies maintain a vitalist contact with the whole natural complex, incorporating into their miniature forms both the plant and animal kingdoms. Lacombe's illustrations are diaphanous, light, poetic, but also have a very scientific air, indeed there are anatomical figures of fairies and highly detailed botanical drawings. Once again, fairies are identified as a bridge between science and sentiment.

Finally, worthy of mention are also *Le Grand Livre des Esprits de la Nature* and *Le Grand Livre des Esprits de la Maison*⁶⁷: these are interesting encyclopaedias on fairies written by Belgian author Richard Ely and illustrated by Frédérique Devos. The layout and contents of the two books are reminiscent of Dubois' encyclopaedias, but the tone of the texts and the drawings is different: irony, erudition and impertinence are important elements, but they are not the key characteristics of these two books which, on the other hand, stand out for the poetry of the descriptions and the flowing – almost *Liberty* style – lines of the illustrations.

9. *Spiderwick: a parallel world woven into reality*

If there is one children's saga where science and fairies, microscopes and sprites, laboratories and elves clearly meet, this is certainly the series of Fantasy novels known by the general name of *The Spiderwick Chronicles*⁶⁸. This series was written by Holly Black – a famous US children's author – and illustrated with fantastic, biological precision by Californian illustrator Tony DiTerlizzi. In the United States the books in this saga were published from 2003 onwards. The story focuses on the adventures of three siblings who, after their parents' divorce, are forced to leave New York and go and live with their mother in a decrepit Victorian style house in the middle of a wood. The children (twin boys and a girl) are initially frustrated by this new situation, because they feel isolated and bored in this old provincial house. However, some strange things around the house – knocking, rustling, odd things that happen – make the children realise that it is not a normal house. Exploring the rooms and corridors, one of the twins finds a hidden room: this is the laboratory and library of Arthur Spiderwick, one of the children's ancestors who, many years earlier, spent

⁶⁷ R. Ely (text), F. Devos (ills.), *Le Grand Livre des Esprits de la Nature*, Paris, Editions Véga, 2017 (third edition); Id. (text), Id. (ills.), *Le Grand Livre des Esprits de la Maison*, Paris, Editions Véga, 2015.

⁶⁸ H. Black (text), T. DiTerlizzi (ills.), *The Spiderwick Chronicles: The Field Guide; The Seeing Stone; Lucinda's Secret; The Ironwood Tree; The Wrath of Mulgarath*, 5 vols., New York, Simon Spotlight, an imprint of Simon & Schuster, 2003-2004.

his life studying the secret world of fairies and sprites. Proof of the existence of magical creatures is kept in this mysterious room, along with newspaper articles, observational notes and books on magical beings. Over his many years of research, Arthur wrote a precious, powerful hand-written guide describing every anatomical, biological, ethological and magical detail of different magical creatures. The three siblings come into possession of this amazing encyclopaedia of fairies, and from here their incredible adventures begin.

The Spiderwick Chronicles led to a consistent number of secondary publications completing the original saga. These books elaborate on the idea of the secret book in which Arthur Spiderwick collected information on the biological and magical wonders of enchanted creatures. These secondary publications are richly illustrated – again by DiTerlizzi – and share the iconographic appearance of 19th century biology books and notebooks stuffed willy-nilly with articles and photographs, comments and thoughts, sketches and maps. These are charming books that would not look out of place in an antique shop. An example of this secondary publications is the picture book *Arthur Spiderwick's Field Guide to the Fantastical World around You*⁶⁹: in the story, the book is a collection of some important works written by Arthur Spiderwick around a hundred years ago; the text sets out to be a manual for young fairy hunters of today. The book presents dozens of magical creatures, from those who are said to live in houses to sea snakes inhabiting the depths of the ocean. Each of these creatures is introduced with an illustration and is accompanied by a long explanatory text and a Latin name similar to those given by Linnaeus, to indicate the biological species, like an authentic scientific classification. The various creatures are catalogued by order, divided according to their habitat (meadows, hills, lakes..). This «magical guide» clearly imitates scientific books.

Conclusions

From the 19th century to modern times, fairies have accompanied children's literature, their paths crossing with science, technology and art: while around 1840 in Great Britain magical creatures were found above all in paintings for adults, from 1870 they became important characters in children's stories and illustrations, and in subsequent decades entered children's literature in many other western countries. A special characteristic of fairies in the 19th and 20th century history of culture was that of metaphorically telling of the unease – particularly among the younger generations – towards industrialisation and social conformism. Indeed, in Victorian times fairies were a symbolic alternative

⁶⁹ T. DiTerlizzi, H. Black, *Arthur Spiderwick's Field Guide to the Fantastical World Around You*, New York, Simon Spotlight, an imprint of Simon & Schuster, 2006.

to the dominating oppressive materialism and moral hypocrisy of the time, exactly as, in the 1960s and 1970s, the «Little People» represented the need of adolescents and young adults to use fantasy to fight conformism and the greyness of the «Cold War» society. Over the decades, illustrated books of fairies have aroused in young readers the dream of returning to nature and the re-enchantment of the world.

Fairies and sprites (creatures belonging to the sphere of the irrational and the past) have incarnated the opposition to the materialist world of industrial society, when they came into contact with science and technology (dimensions belonging to rationality and modernity): fairies became rebels, as soon as they were observed under the microscope, captured on camera, described according to the hypotheses of anthropology, classified using the methods of biology, likened to plants and animals following the models of vitalism and evolutionism. This encounter-contrast between fairies and science has produced many exquisitely made picture books not only for children and adolescents but also for adults who haven't forgotten that they were once children: a considerable number of publications, often with high quality graphics, which, using the metaphor of the «Little People», have told of the (social, artistic, educational and literary) worries and opportunities present in our cultural landscape. The urgent need to find a harmonious solution to the conflict between the natural world and the industrial world, the need to identify a stable point of contact between science and fantasy, and the need to explore and classify the dreams and desires fuelling the deepest corners of our human and cultural heritage, are just some of the questions that fairies have represented over the past two centuries. And, from many points of view, it would appear that their job is not yet done.

*Sources and
Documents*



Fonti e
Documenti

Rinnovamento storiografico e passione civile nella proposta di Carlo Guido Mor di istituire un «Centro Nazionale sulla storia della scuola in Italia» (1940-1942)

Luigiaurelio Pomante
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
luigiaurelio.pomante@unimc.it

Historiographic renewal and civil passion in the proposal of Carlo Guido Mor to establish a «National Center on the history of the school in Italy» (1940-1942)

ABSTRACT: The article intends to present an interesting proposal by Carlo Guido Mor, professor of History of Law at the University of Modena, about the establishment of a «National Center on the history of the school in Italy». The project was presented in Bologna in April 1940 on the occasion of the First National Conference for the History of Italian Universities and then summarized and expanded in August 1942 on the journal «Gli Annali della Università d'Italia». This Center intended to coordinate the studies conducted in Italy on the history of the school in order to make the results of the research more widespread and known.

EET/TEE KEYWORDS: History of school; History of university; Fascism; Italy; XXth Century.

Il 29 agosto 1942, sulle pagine de «Gli Annali della Università d'Italia»¹, periodico universitario diretto da Giuseppe Giustini e fondato per volontà del

¹ Tale periodico fu pubblicato a Roma, a cura del ministero dell'Educazione Nazionale e per i tipi della casa editrice Fratelli Palombi, dal 29 ottobre del 1939 al 1° settembre 1943. Sulla nascita, gli obiettivi, lo sviluppo e i principali temi affrontati ne «Gli Annali della Università d'Italia» si veda in particolare L. Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, Milano, FrancoAngeli, 2018, pp. 31-54 ma anche 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-

ministro dell'Educazione Nazionale, Giuseppe Bottai, con il dichiarato obiettivo «di approfondire lo studio della nostra Università nei molteplici aspetti della sua struttura e delle sue funzioni»², Carlo Guido Mor, allora docente di Storia del diritto presso l'Università di Modena e di lì a poco rettore dell'Ateneo emiliano³, pubblicava un poco noto ma particolarmente interessante articolo dal titolo *Per un Centro Nazionale sulla storia della scuola in Italia*⁴. Tale contributo di fatto riprendeva e ampliava in maniera organica e sistematica l'intervento tenuto dallo stesso giurista lombardo il 7 aprile 1940, in occasione del Primo Convegno nazionale per la storia delle università italiane, promosso dall'Istituto per la storia dell'Università di Bologna⁵ e svoltosi nella città felsinea dal 5 al 7 aprile, quale prima vera opportunità per «stabilire contatti meno occasionali fra quanti si occupavano di storiografia universitaria»⁶. Nell'ultimo giorno del convegno bolognese, infatti, Mor, come risulta dal verbale delle riunioni dell'assise⁷ ma anche come lui stesso ricorda in apertura dell'articolo

377 (al periodico sono dedicate le pp. 353-367).

² Cfr. Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, cit., p. 39.

³ Carlo Guido Mor è stato uno dei protagonisti della storiografia giuridica e istituzionale italiana del Novecento. Studioso infaticabile, egli ha lasciato un gran numero di studi relativi ai più vari settori della disciplina, lungo un ampio arco cronologico. Allievo di Arrigo Solmi e laureatosi a Pavia nel 1925 in Giurisprudenza, divenne professore straordinario di Storia del diritto italiano nel 1934. L'anno successivo fu chiamato a ricoprire la cattedra già tenuta da Melchiorre Roberti e da Pietro Torelli nell'Ateneo di Modena, dove fu preside nel periodo iniziale della guerra e rettore dal 1943 al 1947. A Modena, salvo un breve intervallo a Trieste (1951-52), rimase sino al 1957 quando, subentrando ad Aldo Checchini, passò a Padova. Qui trascorse il resto della sua carriera, conclusa nel 1979 con la nomina a professore emerito. Per un suo dettagliato e completo profilo bio-bibliografico si veda in particolare G. Zordan, *Mor, Carlo Guido*, in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana Treccani, 2012, vol. 76, pp. 406-408.

⁴ C.G. Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, «Gli Annali della Università d'Italia», vol. 3, n. 6, 1942, pp. 457-461 (il testo è riprodotto in appendice).

⁵ Sull'Istituto per la storia dell'Università di Bologna e sulla sua importanza si vedano A. Sorbelli, *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; A. Vasina, *Dalla biblioteca all'insegnamento universitario: l'operosità didattica di Albano Sorbelli nell'Università di Bologna*, «Annali di storia delle università italiane», vol. 2, 1998, pp. 225-230; 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 le pp. 163-166).

⁶ Sul Primo Convegno nazionale per la storia delle università italiane, svoltosi a Bologna dal 5 al 7 aprile 1940, si vedano in particolare: 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 e Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, cit., pp. 55-62. 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. Una parte degli interventi è stata pubblicata in *Atti del Convegno per la storia delle università italiane tenutosi in Bologna il 5-7 aprile 1940 e memorie in esso presentate*, Bologna, Istituto per la storia dell'Università, 1943, vol. 1.

⁷ Tutti i documenti originali relativi al convegno bolognese sono conservati in Archivio Storico

apparso su «Gli Annali della Università d'Italia» due anni più tardi, avanzava, in maniera sintetica ma formale, la proposta di istituire «un 'Centro per la Storia della Scuola Italiana', il quale, sorgendo sotto gli auspici e per iniziativa delle Università, e da esse ricevendo soprattutto continuo impulso e vigore, organizzi, promuova e diriga le indagini ed i lavori intesi ad approfondire egualmente la ricerca storica sulla scuola in tutti i suoi ordini e in tutte le regioni d'Italia»⁸. In pratica il docente dell'Ateneo di Modena, constatando la presenza, all'interno di non poche relazioni del convegno bolognese⁹, di un certo interesse nei confronti della «storia delle scuole preuniversitarie» e rimarcando, al contempo, le lacune storiografiche allora esistenti circa la struttura degli «ordinamenti scolastici degli antichi Stati italiani» o, ancor più, di quelli del periodo dell'«alto medioevo»¹⁰, auspicava l'istituzione di un «Centro nazionale sulla storia della scuola in Italia» che, grazie all'apporto congiunto dei vari atenei italiani che ne avrebbero di fatto garantito la nascita e la crescita, avrebbe favorito lo sviluppo di studi e ricerche qualificate in tal senso.

Tuttavia, la pressoché unanime approvazione della proposta di Mor da parte dei delegati dei vari atenei italiani presenti al convegno di Bologna e l'auspicio rivolto direttamente al ministro Bottai affinché si potesse dare concretezza e in tempi brevi all'idea dello storico del diritto¹¹, non furono seguiti da disposizioni ufficiali da parte del ministero. Così, proprio al fine di dare l'accelerazione decisiva e definitiva al suo progetto, Mor decise di tornare sull'argomento pubblicando appunto il contributo apparso su «Gli Annali della Università d'Italia» nell'agosto 1942, nel quale l'autore si preoccupava innanzitutto di spazzare il campo da possibili fraintendimenti circa la sua

dell'Università degli Studi di Bologna (d'ora in avanti ASUNIBO), Feste Civili-Congressi-Centenari-Commemorazioni, posizione 78, Busta 31, 1939-1940, fasc. Convegno italiano per la storia delle Università. Tra i documenti conservati vi sono anche i *Verbali delle riunioni*. La proposta di Mor è riportata sinteticamente nel verbale di domenica 7 aprile.

⁸ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 458.

⁹ Mor fa specifico riferimento alle relazioni di Pietro Torelli (*Rapporti fra Comune e Università*), Mario Viora (*Stato e Università: i piani organici nel sec. XVII*), Ugo Gualazzini (*Il capitolare olonese e il sorgere dello «Studium» nelle città emiliane*), Carlo Morossi (*Scuole universitarie minori della Repubblica di Venezia nei secoli XVII e XVIII*), oltre ovviamente che alla sua, intitolata *Scuole preuniversitarie dell'alto medioevo e loro rapporti coll'Università*.

¹⁰ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 458.

¹¹ La proposta di Mor, delegato dell'Università di Modena al convegno bolognese insieme al collega Ignazio Luzzatto, dopo una breve discussione, ottenne l'approvazione all'unanimità da parte dei trentadue delegati presenti all'assise con l'invito rivolto direttamente al ministro Bottai dal prof. Pier Silverio Leicht, presidente dell'assemblea, a prendere in considerazione quanto prima il progetto presentato da Mor e subito approvato. Occorre altresì precisare che in sede di discussione della proposta, il dott. Nicola Spano, direttore amministrativo dell'Università di Roma, chiese a Mor di specificare meglio, anche in altra occasione, che tipo di legame intendesse instaurare tra le università e il nascente Centro. Si veda ASUNIBO, Feste Civili-Congressi-Centenari-Commemorazioni, posizione 78, Busta 31, 1939-1940, fasc. Convegno italiano per la storia delle Università, *Verbali delle riunioni*, 7 aprile 1940.

presunta volontà di svalutare o disconoscere l'importanza degli studi esistenti condotti o delle pubblicazioni di storia della scuola fino a quel momento edite. Come ricorda bene lo stesso Mor, infatti, già il 19 aprile 1940, a pochi giorni dal suo intervento bolognese e riprendendo di fatto «qualche voce discorde, non dalla proposta, ma da certe mie affermazioni, [che] si fece sentire nella sala», sulle pagine del periodico bolognese «L'Assalto», settimanale della Federazione provinciale fascista fondato dal giornalista Nanni Leone Castelli¹², un articolo a firma del pedagista Roberto Mazzetti¹³, dal titolo *Un centro di studi storici*¹⁴, pur riconoscendo «quanto mai giustificato questo fervore di studi storici sulla Università promosso da Bottai, e giustificata [...] la proposta di un centro di studi storici su tutta la nostra Scuola», aveva tacciato tuttavia Mor di eccessiva «faciloneria» nel sostenere che «in Italia manchino ricerche storiche nella scuola media e elementare», ricordando al contrario l'esistenza di illustri «studiosi di problemi educativi attuali e storiografici, come i nostri Vidari, E. Codignola, Gambaro, Calò, Benetti-Brunelli ecc. che sono assai benemeriti per le ricerche condotte su tanti aspetti tradizionali della nostra scuola media ed elementare». A giudizio del Mazzetti, pertanto, l'atteggiamento di Mor al convegno di Bologna non era stato che infelice espressione di quel pessimo costume tipicamente italiano di «misconoscere e svalutare, senza adeguate conoscenze, quello che è stato fatto nel campo delle ricerche culturali». Inoltre, lo studioso bolognese aveva rivendicato quale prerogativa pressoché esclusiva dei pedagisti quella di occuparsi dei principali nodi storiografici

¹² «L'Assalto» fu il settimanale della Federazione provinciale fascista, nel quale è possibile ripercorrere la storia del fascismo bolognese, dallo squadristico degli anni Venti fino al secondo conflitto mondiale. Contrariamente a quanto si ritiene non fu fondato da Giorgio Pini e inizialmente era un foglio dannunziano più che fascista, anche se i futuristi ne rivendicano la paternità. Fu creato da Giovanni Leone Castelli, detto Nanni, un ex legionario fiumano di Foggia che stava prestando il servizio militare a Bologna. Il primo numero vide la luce il 18 novembre 1920 mentre l'ultimo risale al 24 luglio 1943, il giorno prima della caduta di Mussolini. Primo direttore fu Leandro Arpinati, anche se lasciò quasi subito il posto a Dino Grandi, il quale si limitava a scrivere i fondi, mentre la redazione del giornale era affidata ad alcuni volontari. Nei primi tempi il giornale non ebbe una redazione fissa, perché Arpinati trascurando la direzione del periodico preferiva guidare le squadre d'azione. Per una attenta e puntuale analisi dei contenuti de «L'Assalto» si rimanda soprattutto a: N.S. Onofri, *I giornali bolognesi nel ventennio fascista*, Bologna, Editrice Moderna, 1972, pp. 137-166. Il periodico è attualmente disponibile on line, seppur con lacune, sul portale <<http://parridigit.istitutoparri.eu/fondi.aspx?key=ricerca&fondo=33>> (ultimo accesso: 26.04.2018).

¹³ Roberto Mazzetti è stato un importante pedagista di origini bolognesi, provveditore agli studi in numerose sedi della Penisola, quindi, dal 1956, docente ordinario di Pedagogia all'Università di Salerno, ateneo dove rimase fino al pensionamento. Sotto il ministero dell'Educazione nazionale di Giuseppe Bottai, tra il 1936 e il 1940, contribuì con altri giovani studiosi alla elaborazione della *Carta della scuola* (1939), il più importante documento scolastico del fascismo maturo. Su di lui si veda G. Acone (ed.), *Società e cultura. Testimonianza-colloquio con Roberto Mazzetti*, Napoli, Morano, 1977 ma soprattutto l'aggiornato ed esaustivo profilo bio-bibliografico di G. Chiosso, *Mazzetti Roberto*, in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 vols., Milano, Editrice Bibliografica, 2013, vol. 2, pp. 147-148.

¹⁴ R. Mazzetti, *Un centro di studi storici*, «L'Assalto», vol. 21, 19 aprile, 1940, p. 12.

legati al mondo della scuola poiché «una storia della scuola, se non vuole essere meramente erudita ed episodica, e cioè aneddotica e senza problemi, deve essere fatta preferibilmente da studiosi di problemi educativi, giacché senza passione e conoscenza dei problemi educativi di oggi», la ricerca storica sarebbe risultata «priva di quello spirito di contemporaneità, cioè di attualità, organicità e vivezza che è essenziale ad ogni vera storiografia»¹⁵.

La critica mossa da Roberto Mazzetti era ovviamente rispedita al mittente da Carlo Guido Mor il quale, sulle pagine de «Gli Annali della Università d'Italia», con uno stile di scrittura elegante e con fermezza argomentativa, liquidava la polemica sollevata nei suoi confronti come un semplice «equivoco, che conviene sgomberare ormai a mente calma e riposata, *sine ira et studio*»¹⁶. Ricordando innanzitutto di essere figlio di Carlo Antonio Mor¹⁷, pedagogista e uomo di scuola legato agli ambienti milanesi, e di aver proprio da lui ereditato libri e opere dedicati alla scuola nonché una concreta e puntuale conoscenza dei pur pregevoli studi compiuti dalle generazioni passate, il giurista dell'Ateneo modenese ribadiva che, a suo giudizio, «la conoscenza nostra sugli ordinamenti passati non è né precisa né organica»¹⁸. Proprio redigendo il volume di storia dell'Università di Modena¹⁹, egli, ad esempio, aveva potuto constatare «come non soltanto sia stata pressoché ignorata l'organizzazione delle così dette 'Scuole Basse', cioè le Scuole dell'odierno ginnasio, ma non si sia neppure posta una discriminazione negli studi filosofici, aggregati all'Università, ma effettivamente per metà di carattere liceale»²⁰.

Così, come sulla storia delle università italiane, pur già oggetto di numerosi e autorevoli studi nel corso dei secoli, il ministro Bottai aveva comunque deciso di avviare una raccolta di monografie al fine di rinverdire i fasti della gloriosa tradizione degli atenei più antichi e «di grande nobiltà culturale», nonché di

¹⁵ *Ibid.*

¹⁶ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 458.

¹⁷ Carlo Antonio Mor, diplomatosi maestro a Crema nel 1878, si trasferì a Milano alcuni anni più tardi avendo vinto il concorso per le scuole comunali. Nel 1891, presso l'Accademia Scientifico letteraria, conseguì il diploma di abilitazione all'insegnamento di Pedagogia e morale negli istituti magistrali, ma non se ne servì mai, per non abbandonare la scuola elementare. Per quattro anni – dal 1899 al 1902 – diresse «Il pensiero dei maestri», uno dei primi giornali di categoria, che abbandonò quando fu nominato direttore didattico della scuola di Vicolo Santo Spirito (poi intitolata a Luigi Rossari), direzione che tenne per venti anni (1902-1922). Su di lui si veda l'interessante profilo bio-bibliografico redatto dal figlio in C.G. Mor, *Carte Carlo Antonio Mor e famiglia, 1833-1930*, Brescia, s.e., 1961.

¹⁸ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 458.

¹⁹ L'autore si riferisce alla prima stesura dell'opera *Storia dell'Università di Modena*, già pronta al principio degli anni Quaranta ma poi realmente data alle stampe integralmente soltanto nel 1953 (C.G. Mor, *Storia dell'Università di Modena*, Modena, Ed. Soc. Tip. Modenese, 1953), quindi ristampata nel 1963, ed in seguito rivista ed integrata da Pericle Di Pietro per la collana «Storia delle Università italiane», diretta da Giuseppe Ermini (C.G. Mor, P. Di Pietro, *Storia dell'Università di Modena*, 2 vols., Firenze, Olschki, 1975).

²⁰ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 458.

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»²¹, così una similare operazione storiografica, seppur in forme e modalità diverse, era auspicata da Mor per «gli insegnamenti medi ed elementari, per cui le fonti archivistiche molto spesso sono disperse nei fondi più disparati, e principalmente in quelli di vari Istituti religiosi, che, si può dire fino alla Rivoluzione Francese, furono i depositari dell'istruzione elementare e media»²².

A parere di Mor, infatti, anche alla luce della rinnovata attenzione rivolta dal titolare della Minerva nei confronti della scuola, bisognevole secondo Bottai di «un nuovo slancio, di uno spirito nuovo»²³, il momento appariva quanto mai opportuno «per coordinare gli sforzi dei singoli benemeriti studiosi in una organicità d'intenti, di metodi e di ricerche». Pur rifiutando l'adozione di un paradigma unico e prestabilito entro il quale inquadrare le ricerche storiche in corso, lo storico del diritto proponeva che queste fossero comunque condotte in maniera coordinata al fine di evitare inutili dispersioni di forze, studi troppo generici e ripetitivi su temi eccessivamente sfruttati e soprattutto raccomandava un maggiore coinvolgimento anche di quegli studiosi che, provenendo dai centri minori, avrebbero dovuto fare i conti con inevitabili lacune bibliografiche o archivistiche (magari «perché non possono procurarsi i libri necessari»). Cogliendo tale criticità, Mor iniziava a delineare nel suo contributo alcuni dei possibili compiti da assegnare al suggerito «Centro Nazionale sulla storia della scuola in Italia». In prima battuta, esso, ad esempio, avrebbe potuto assumere proprio il ruolo di coordinamento di tutte le ricerche storiche condotte in materia di scuola e di educazione, garantendo la pubblicazione periodica, negli appositi giornali didattici e nelle specifiche riviste, di un bollettino bibliografico o di un notiziario critico, grazie al quale aggiornare gli studiosi di problemi scolastici di ogni parte d'Italia sui risultati fino a quel momento raggiunti.

²¹ Sull'iniziativa editoriale della collezione di monografie promossa dal ministro Bottai si veda soprattutto Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, cit., pp. 21-29. I documenti originali relativi all'iniziativa sono reperibili in 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, vol. 66, n. 6, 7 febbraio 1939, pp. 295-301 (le citazioni sono tratte dal Bollettino).

²² Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 459.

²³ 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 (la citazione è a p. 133). Sull'attenzione rivolta dal ministro Bottai al rinnovamento della scuola si vedano R. Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, Firenze, La Nuova Italia, 1979; M. Ostenc, *La scuola italiana durante il fascismo*, Roma-Bari, Laterza, 1981; J. Charnitzky, *Fascismo e scuola. La politica scolastica del regime (1922-1943)*, Firenze, La Nuova Italia, 1994; M. Galfré, *Giuseppe Bottai. Un intellettuale fascista*, Firenze, Giunti, 2000.

In ogni modo, precisava altresì Mor a scanso di ulteriori equivoci, le iniziative promosse dal nascenturo «Centro Nazionale sulla storia della scuola in Italia» non si sarebbero assolutamente poste in concorrenza con il progetto editoriale sviluppato proprio in quegli anni dalla Regia Accademia d'Italia che, dietro la spinta propulsiva del pedagogista Giovanni Calò, stava caldeggiando la raccolta degli scritti più significativi dei pedagogisti della Penisola, sotto il titolo di *Monumenta Italiae Pedagogica*²⁴, avviando «decisamente alla soluzione un annoso problema, che solo i più colti studiosi potevano affrontare, la conoscenza, cioè, integrale delle correnti pedagogiche affermatesi di volta in volta fra noi»²⁵. Il «Centro Nazionale sulla storia della scuola in Italia» senza interferire in alcun modo con tale prestigiosa e autorevole iniziativa culturale, avrebbe dal canto suo potuto provvedere alla pubblicazione di una serie parallela – e complementare ai *Monumenta* – nella quale raccogliere invece i provvedimenti legislativi scolastici adottati nei diversi periodi storici, in modo da dare vita «a due serie, quella dell'Accademia, relativa allo sviluppo teorico, e quella del Centro, che rispecchierà la traduzione in pratica dei movimenti di pensiero»²⁶.

Quindi, dopo aver proposto e presentato le due iniziative concrete (bollettino bibliografico e raccolta di provvedimenti legislativi) alle quali avrebbe potuto lavorare già nell'immediato il nuovo «Centro Nazionale sulla storia della scuola in Italia», qualora il ministero avesse dato il suo *placet* ufficiale alla costituzione, Mor passava ad individuare alcuni possibili temi che riteneva particolarmente meritevoli di approfondimento e di analisi da parte degli studiosi afferenti al Centro. Tra questi egli proponeva di riservare una particolare attenzione, ad esempio, per l'età contemporanea, al complesso rapporto tra il sovraffollamento degli atenei italiani e il numero degli studenti che uscivano dalle «scuole basse» con specifica attenzione per la soluzione proposta del *numerus clausus* degli accessi universitari²⁷; per il periodo medievale, invece,

²⁴ Sui *Monumenta Italiae Pedagogica* si veda l'interessante ed originale contributo «*Monumenta Italiae Paedagogica*» di Giovanni Calò *tra esigenze di ricostruzione del canone pedagogico nazionale e tensioni anti-idealistiche (1914-1945)*, presentato da Juri Meda al convegno svoltosi a Bologna nel febbraio 2016 ed organizzato dal Centro italiano per la ricerca storico educativa (CIRSE), intitolato *Sguardi della storia. Luoghi, figure, immaginario e teorie dell'educazione*. Sulla figura di Giovanni Calò si vedano invece E. Scaglia, *Giovanni Calò nella pedagogia italiana del Novecento*, Brescia, La Scuola, 2013 e J. Meda, *Calò Giovanni*, in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, cit., vol. 1, pp. 246-247.

²⁵ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 459.

²⁶ *Ibid.*, p. 460.

²⁷ Il tema del sovraffollamento degli atenei italiani e l'ipotizzata soluzione del numero chiuso degli accessi universitari furono oggetto di accesi dibattiti sia negli anni conclusivi del periodo fascista sia nell'immediato secondo dopoguerra. Particolarmente interessanti sulle pagine degli «*Gli Annali della Università d'Italia*», risultano i 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*

incoraggiava lo studio del ruolo svolto da Comuni o Signorie nella creazione di scuole di alta e media cultura ma anche di scuole di abaco ed elementari o del trattamento economico e giuridico dei docenti e delle disposizioni statutarie o signorili a loro rivolte e delle quali era dato sapere assai poco.

A dedicarsi a tali contributi di elevato valore scientifico, spesso anche molto articolati e che implicavano una qualificata competenza da parte di chi li preparava e li elaborava, dovevano essere chiamati non semplici «studiosi volenterosi», bensì «specialisti che abbiano dimestichezza con le vecchie pergamene». Di qui la necessità di fare in modo che tali ricerche fossero «patrociate e dirette nell'ambito universitario» con l'appello rivolto dal docente dell'Ateneo di Modena soprattutto ai colleghi di materie storiche «perché a tali studi indirizzino i loro allievi», e in special modo ai professori della Facoltà di Magistero, «che più sono a contatto con giovani provenienti dalla classe magistrale, e per i quali dovrebbe esser quasi un canone fondamentale il conoscere la storia della scuola»²⁸. Fondamentale era altresì che ogni privata iniziativa promossa e coordinata dal «Centro Nazionale sulla storia della scuola in Italia» fosse preceduta da un accurato studio preliminare dell'argomento poiché era solo attraverso il «vaglio continuo della nostra esperienza nazionale, in ogni campo scolastico, che si potrà conoscere il contributo che la Scuola, in tutti i suoi aspetti, ha portato alla vita dell'Italia»²⁹.

Nella sua parte conclusiva, al fine di lasciare un messaggio chiaro ed inequivocabile a studiosi, istituzioni e ministero dell'Educazione Nazionale, il «manifesto» del «Centro Nazionale sulla storia della scuola in Italia», ossia l'articolo pubblicato da Carlo Guido Mor su «Gli Annali della Università d'Italia» nell'agosto 1942, puntualizzava e riassumeva gli obiettivi che avrebbero dovuto guidare l'istituzione della quale si incoraggiava la creazione. Innanzitutto il Centro, ferma restando la sua funzione informativa «di mantenere al corrente gli studiosi più lontani dai centri di studio, di tutto il movimento culturale-storico» in atto nella Penisola, «anche attraverso rapporti diretti, oltre che attraverso cronache e notizie», si sarebbe dovuto impegnare per promuovere un'ampia raccolta di tutto il materiale legislativo riguardante l'insegnamento in ogni ordine e grado e per raccogliere e organizzare tutti quei dati che avrebbero permesso agli studiosi di ricostruire la vita scolastica e parascolastica del Paese al fine di favorire la redazione di una serie di monografie sui vari ordini di studio nelle singole regioni della Penisola. Esso, inoltre, avrebbe dovuto vigilare, incoraggiare e indirizzare le iniziative dei singoli studiosi sia

Annali della Università d'Italia», vol. 4, n. 3, 28 febbraio 1943, pp. 162-168. Per un quadro più dettagliato sull'immediato secondo dopoguerra si veda invece L. Pomante, *La politica universitaria del ministro Guido Gonella negli anni della ricostruzione postbellica: dall'Inchiesta per la riforma della scuola al D.D.L. n. 2100*, «Annali di storia delle università italiane», vol. 22, n. 1, 2018, pp. 67-92.

²⁸ Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, cit., p. 460.

²⁹ *Ibid.*, p. 461.

quelle miranti a ricostruire vicende scolastiche locali sia quelle animate da prospettive di ricerca più ampie e ambiziose di carattere nazionale.

L'iniziativa di Carlo Guido Mor, nonostante le buone e stimolanti intenzioni del suo proponente, il sincero entusiasmo per l'idea manifestato dal ministro Bottai e la già ricordata piena condivisione del progetto da parte del mondo intellettuale universitario al convegno di Bologna del 1940 o sulle pagine de «Gli Annali della Università d'Italia», avrebbe purtroppo dovuto fare i conti con il degenerare della situazione bellica dopo l'entrata in guerra dell'Italia del giugno 1940. La creazione di un «Centro Nazionale sulla storia della scuola in Italia» fu dunque definitivamente accantonata e l'Italia perse una grande occasione per dar vita, anzi tempo, ad una prima vera e qualificata forma stabile di coordinamento delle ricerche e degli studi sulla storia della scuola³⁰.

³⁰ Su tale carenza di coordinamento e di rigore negli studi storico educativi e scolastici in Italia si veda il sempre valido contributo di M. Raicich, *Scuola, cultura e politica da De Sanctis a Gentile*, Pisa, Nistri-Lischi, 1982, pp. 19-26 ma anche il più recente R. Sani, *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, pp. 8-9.

Appendice

*Per un Centro Nazionale sulla storia della scuola in Italia**

[C.G. Mor, *Per un Centro Nazionale sulla storia della Scuola in Italia*, «Gli Annali della Università d'Italia», vol. 3, n. 6, 1942, pp. 457-461]

Alla chiusura del Convegno per la Storia delle Università italiane, indetto in Bologna ai primi di aprile 1940 dal Ministro Bottai, avanzai una proposta che, dopo un'ampia discussione, fu approvata col seguente ordine del giorno:

«Il primo Convegno Nazionale per la Storia delle Università italiane, plaudendo al desiderio espresso dal Ministro dell'Educazione Nazionale che ogni Ateneo abbia il suo Istituto inteso alla raccolta del materiale per la storia di ogni singola Università; constatando come già in alcune memorie presentate a questo Convegno dai professori Torelli, Mor, Viora, Gualazzini, Morossi, ecc., si sia progettata o accennata la storia delle Scuole pre-universitarie; constatando come quest'ultimo campo non sia stato ancora organicamente studiato, mentre la storia delle Scuole di ordine inferiore, pubbliche e private, necessita di larghe ed approfondite ricerche e di studi condotti con rigore di metodo; e riconoscendo, d'altronde, che nella Università trovano la più alta espressione unitaria, il valore formativo e la pratica efficienza di ogni grado; fa voti che il Ministro dell'Educazione Nazionale voglia istituire un «Centro per la Storia della Scuola Italiana», il quale, sorgendo sotto gli auspici e per iniziativa delle Università, e da esse ricevendo soprattutto continuo impulso e vigore, organizzi, promuova e diriga le indagini ed i lavori intesi ad approfondire egualmente la ricerca storica sulla scuola in tutti i suoi ordini e in tutte le regioni d'Italia; ed invita in pari tempo i camerati docenti di materie storiche a maggiormente influire sui propri allievi, affinché vengano iniziate ed approfondite le ricerche indirizzate a questo preciso scopo».

Qualche voce discorde, non dalla proposta, ma da certe mie affermazioni, si fece sentire nella sala e, poco dopo, nel giornale bolognese «L'Assalto» del 19 aprile 1940 (articolo di Roberto Mazzetti) in cui si scrisse: «Non si creda, però, come è stato detto con faciloneria da chi ha presentato al Convegno questa proposta, che in Italia manchino ricerche storiche sulla scuola media ed elementare» ricordando alcuni egregi studiosi, e continuando poi: «Non solo, ma

* La proposta del prof. Mor merita la più seria e simpatica considerazione; e perciò abbiamo invitato l'autore a voler ravvivarne il ricordo e a precisarla sulle pagine degli «Annali». Vivamente ci auguriamo che, non appena i tempi lo consentano, essa possa tradursi in realtà; e poiché, per le ragioni esposte dal nostro esimio collaboratore, è dall'Università che questo Centro Nazionale potrà ricevere vigore d'impulso, disciplina di organizzazione, serietà di metodo, la esecuzione di un'opera così ampia e feconda potrà costituire una nuova e non piccola benemeranza della nostra Università (N.d.D.).

è un pessimo costume il misconoscere e svalutare, senza adeguate conoscenze, quello che è stato fatto nel campo delle ricerche culturali, e si aggiunga che ciò non è neppur segno di serietà politica».

Evidentemente, il mio egregio censore non comprese completamente il mio pensiero, e di qui sorse l'equivoco, che conviene sgomberare ormai a mente calma e riposata, *sine ira et studio*, per commentar poi la proposta da me avanzata.

Figlio di un pedagogista che ha dedicate parecchie fatiche alla ricerca storica per quanto riguarda la Scuola milanese, evidentemente non avrei potuto dimenticare quanto aveva fatto la generazione precedente, tanto più che alcuni dei libri indicati li possiedo, pervenutimi da mio Padre. Ma l'affermazione mia, che ancor poco si è fatto per lo studio storico della scuola italiana, aveva ed ha questa portata: che la conoscenza nostra sugli ordinamenti passati non è né precisa né organica.

Redigendo il volume di storia dell'Università di Modena – comincio da una esperienza personale, che può anche essere un *experimentum in corpore vili* – ho potuto constatare come non soltanto sia stata pressoché ignorata l'organizzazione delle così dette «Scuole Basse», cioè le Scuole dell'odierno ginnasio, ma non si sia neppure posta una discriminazione negli studi filosofici, aggregati all'Università, ma effettivamente per metà di carattere liceale. Se restiamo, poi, nell'ambito universitario, se non fosse venuta a proposito l'iniziativa del Ministro Bottai per la raccolta di monografie storiche, ben poco avremmo potuto sapere sulle vicende delle Facoltà, dei metodi di insegnamento, degli istituti scientifici, se si eccettua qualche esempio isolato (Bologna, Roma, Siena, Torino). Ma anche queste monografie non esauriscono l'argomento, anzi, proprio secondo l'intendimento del Ministro, debbono essere il punto di partenza per ulteriori, approfondite indagini particolari.

Le stesse osservazioni si possono ripetere per gli insegnamenti medi ed elementari, per cui le fonti archivistiche molto spesso sono disperse nei fondi più disparati, e principalmente in quelli di vari Istituti religiosi, che, si può dire fino alla Rivoluzione Francese, furono i depositari dell'istruzione elementare e media.

Ma soprattutto è necessario – ed a questo mirava la mia proposta – coordinare gli sforzi dei singoli benemeriti studiosi in una organicità d'intenti, di metodi, di ricerche. Non voglio dire che le ricerche storiche si debbano svolgere secondo un paradigma prestabilito, perché allora si verrebbe a togliere ad esse ogni vigore; ma si possono coordinare, talvolta indirizzare, quando, ad esempio, siano intraprese da studiosi volenterosi, ma nuovi all'ambiente storico. Non è raro il caso di ricercatori che lavorano in centri minori, che hanno, quindi, a disposizione un discreto materiale documentario, ma non sono forniti di adeguate conoscenze bibliografiche, perché non possono procurarsi i libri necessari; e di conseguenza, la loro scienza, se porta utili contributi archivistici, qualche volta naufraga nel generico, nel vieto, nel ripetuto.

In loro soccorso può benissimo venire il Centro Nazionale con l'inserzione, nei giornali didattici o nelle apposite riviste, di un bollettino bibliografico, o di un notiziario critico.

Ma si può far di più.

L'iniziativa della R. Accademia d'Italia di promuovere la raccolta degli scritti dei più significativi pedagogisti nostri, i *Monumenta Italiae Pedagogica*, avvia decisamente alla soluzione un annoso problema, che solo i più colti studiosi potevano affrontare, la conoscenza, cioè, integrale delle correnti pedagogiche affermatesi di volta in volta fra noi: ma il Centro Nazionale, senza interferire con tale iniziativa, potrà benissimo promuovere la pubblicazione di una serie parallela con la raccolta dei provvedimenti legislativi adottati nei vari tempi e nei vari Stati preunitari. In sede di disciplina delle norme fondamentali per questa raccolta si potranno chiarire i termini di tempo e di spazio, anche la stessa natura dei documenti da raccogliere, ma fin d'ora non può sfuggirne l'utilità: si avranno così due serie, quella dell'Accademia relativa allo sviluppo teorico, e quella del Centro, che rispecchierà la traduzione in pratica dei movimenti di pensiero.

Nella recente discussione svoltasi sul quindicinale «Vita Universitaria» a proposito del problema degli studenti e del loro affollamento in alcune Università, ho veduto prospettato un certo numero di soluzioni, fra le quali quella di limitare il numero delle lauree o di adottare il *numerus clausus*. Queste soluzioni, che possono parer nuove, son già state applicate, e proprio la mia recente esperienza sui documenti modenesi mi ha dato campo di rilevarne l'applicazione nel periodo 1821-1848. Non so se anche altrove siano state applicate; ma l'osservazione è bastevole per mostrare che anche dalla ricerca storica si può ricavare qualche elemento o qualche insegnamento per la soluzione di problemi attuali.

Che si potrà fare per i tempi più antichi, per esempio per il Medio Evo? Qui, certamente, non ci potremo promettere una gran messe di notizie: l'insegnamento – e l'ha mostrato tanto bene il Manacorda nel suo esauriente libro – era quello che era, vincolato da certe forme tradizionali (ed anche da certi pregiudizi), da cui una qualunque idea pedagogica esulava. E sta bene. Ma poco sappiamo non dico sulla organizzazione, ma sulla esistenza di scuole monastiche o capitolari, sull'intervento dei Comuni e delle Signorie nella creazione di scuole di alta o media cultura; e meno ancora di quelle scuole di abaco ed elementari che pur dovevano sussistere. Un altro campo, dunque, di ricerche: contratti di conduzione d'insegnanti, disposizioni statutarie o signorili, ricordi di annali o di cronache, e via di seguito.

Ricerche, preciserò, che non possono essere, questa volta, affidate a studiosi volenterosi, ma solo a specialisti che abbiano dimestichezza con le vecchie pergamene, e che possono soltanto essere patrocinate e dirette nell'ambito universitario. Ed è per questo che appunto ai colleghi di materie storiche ho voluto rivolgere un appello perché a tali studi indirizzino i loro allievi. Specialmente vorrei che questo appello fosse raccolto dai professori della Facoltà di Magistero, che più sono a contatto con giovani provenienti dalla classe magistrale, e per i

quali dovrebbe esser quasi un canone fondamentale il conoscere la storia della scuola.

Come si vede, il programma si va tanto più allargando, quanto più si osservano i vari aspetti della scuola, anche senza voler approfondire, come, evidentemente, non si può far qui, in un breve articolo di carattere generale.

Si tratta, in definitiva, di coordinare una serie d'iniziative private e di promuoverne altre, dopo un'accurata preparazione; ed è solo attraverso questo vaglio continuo della nostra esperienza nazionale, in ogni campo scolastico, che si potrà conoscere il contributo che la Scuola, in tutti i suoi aspetti, ha portato alla vita dell'Italia. Anche la storia iconografica potrà portare ottimi risultati a questo proposito.

Ricapitoliamo e precisiamo.

Compito del *Centro Nazionale per la Storia della Scuola Italiana* dovrebbe essere:

- a. promuovere un'ampia raccolta di tutto il movimento legislativo riguardante l'insegnamento, in ogni suo grado e ordine;
- b. raccogliere tutti quei dati storici, che permettono di ricostruire la vita scolastica e para-scolastica;
- c. promuovere una serie di studi monografici sui vari ordini di studio nelle singole regioni;
- d. indirizzare, incoraggiare e vigilare le iniziative individuali sia per quanto riguarda le vicende storiche locali sia per quelle di carattere più ampio;
- e. mantenere al corrente gli studiosi più lontani dai centri di studio, di tutto il movimento culturale-storico, anche attraverso rapporti diretti, oltre che attraverso cronache e notizie.

Il compito non è né lieve né semplice, ma proprio per questo è tanto più attraente e proficuo; ed io confido che la buona volontà dei singoli potrà e saprà apportare al programma così tracciato sostanziali sviluppi e miglioramenti, ma soprattutto quel contributo fattivo ed entusiastico, che permetterà di tradurlo efficacemente in pratica.

Critical Reviews



Rassegne critiche,
Discussioni, Recensioni

Critical Reviews / Rassegne critiche

A reflection on *Canon Constitution and Canon Change in Children's Literature**

Haifeng Hui
English Department
School of Foreign Languages
Huazhong University of Science and
Technology
Wuhan (China)
huihf@hust.edu.cn

ABSTRACT: This collection on canon studies in the realm of children's literature aims to explore canon formation, decanonization and recanonization processes that lie at the very core of children's literature, which constitute a hitherto underdeveloped area of research, especially in comparison with canon research in general literature. The collection comprises three thematic strands: canon and cultural capital, challenges to the canon, and gatekeeper agents of the canon. By drawing on a wide range of essays covering multiple nationalities and historical periods, the collection explores the diverse social, cultural, educational and political contexts that contribute to the dynamics of canon formation and canon changes.

EET/TEE KEYWORDS: Children's literature; Canon studies; Decanonization; Recanonization; Cultural function.

The collection under review makes a milestone contribution in the research of children's literature in general and in canon studies in particular. As has been pointed out by the editors, canon studies in literary studies have a history of almost forty years, and have developed social-cultural and aesthetic perspectives. Though the two perspectives are incompatible due to their different presumptions, they are in fact complementary to each other, therefore enabling a more comprehensive picture of the mechanisms of canonization. But, research into the canon of children's literature, though numerous conferences and

* This work is supported by the Ministry of Education of the People's Republic of China, Humanities and Social Sciences Foundation (17YJC752009). The article is inspired by the analysis of the recent book: B. Kümmerling-Meibauer, A. Müller (edd.), *Canon Constitution and Canon Change in Children's Literature*, New York and London, Routledge, 2017, pp. 254.

publications are concerned with classics, studies on canonization are scanty, or, to use the editors' words: «they have been pursued with less rigour, with the exception of»¹. The word «exception» explicitly demonstrates the scarcity of canon studies in children's literature, thus underscoring the dire need of more research in this field.

The difference of fruitfulness of canon research in general literature and in children's literature implies a deeper difference at the same time, which is observed by the editors: «All these approaches to canon issues in children's literature have in common that they largely ignore the above mentioned developments in general canon theory, or, at least, do not actively take cognizance of them»². The difference in the current state of research in the two fields reveals an underdevelopment of canon research in children's literature, which is possibly resulted from a dissociation from the general literary studies, but, equally important, it also reflects a deeper cause that lies in the very peculiarity of children's literature, summarized in the introduction as «an approach to the canon as an authoritative structure that makes statements about intrinsic values of text» and more poignantly and metaphorically represented by Peter Hunt in his unique prelude after the introduction. The two different methodological paths in general canon studies are paralleling to each other, whereas the studies of canon of children's literature implies a containing, rather than paralleling, power relationship between the outside gatekeepers and the intrinsic aesthetic assessment, when it can also be approached from the two critical paths in general canon studies, which explains the structure of the collection into three parts.

The introduction also challenges the dichotomy of socio-cultural and aesthetic approaches in the application in canon of children's literature, questioning the ambiguous aesthetic autonomy in children's literature, which has always been lingering between pure literariness and didacticism, as well as the alleged stability of a canon in children's literature. In its strenuous effort to depict the close relationship and attention to its peculiarities of canon issues in children's literature in relation to general literature, the introduction has made a unique and important theoretical contribution to the field. In a field marked by sufficient case studies and yet lack of theoretical construction, such an introduction is both reassuring and in dire need.

The prelude by Peter Hunt, rarely common in a scholarly collection, gives the book a flourish peculiar to children's literature. Hunt's beginning paragraphs, though brief compared to the introduction, succinctly points out the fundamental difference of canon issues in children's literature and general literature, arguing that «Fortunately (or unfortunately) the kinds of power relationships that allow canon formation in adult literature (as explored in this volume) do not always –

¹ *Ibid.*, p. 2.

² *Ibid.*, p. 4.

or even often – apply in the world of children's literature»³. The prelude features an ingenious adaptation of Andersen's *The Emperor's New Clothes*», blended with apposite quotes from literary critics including Leavis, Arnold, Alderson, and Inglis, which, in their new circumstances, take on a satiric tone about the arbitrariness of critical judgment. At the end, agreeing on a humorous quote from Nodelman, Hunt puts it in a more contrasting way: «in the Adult world of Canons, the book judges you; in the world of Children, you judge the book»⁴.

The main body of the volume comprises thirteen chapters, divided into three thematic parts – «Canons, Cultural Capital and Policies of Community Building», «The Challenges of the Canon: Genre, Gender, Avant-garde», and «Keeping the Gate-agents in Canon Formation». Part I is rightfully informed and permeated by John Guillory's famous term «cultural capital», which he borrowed from Bourdieu but furthered it in his sociology of literature. For any socio-cultural studies of the canon, especially of the canon of children's literature, cultural capital would serve as a right starting point. The first part is centered on the cultural function of the canon in its establishment of cultural identities and memories, which is why, with the only exception of the third chapter, all the chapters bear a national perspective: Israeli, the UK, the Soviet Union and Poland. Yael Darr's Chapter 1, *National Building and Children's Literary Canons: The Israeli Test Case*, selects the period of national consolidation of Israel and explores texts belonging to the old tradition and those works that follow the new tradition of socialistic poetics and negate diaspora. Darr explains that the reason why the new tradition survived the period of transition and became classics of the nation lies in the very ambivalence of the innovative canon that enables subversive and critical readings by the young. She concludes that these ambivalences and the multiple strata woven into the new canon assured its survival through periods of different tastes and interpretative patterns. Anja Müller et al in the second chapter, *Canon Formation and Social Imaginaries in British Children's Literature*, apply functional approach to research into the implications of concepts of social imaginaries in the case study of changing democratic values in nineteenth- and twentieth-century Robinsonades for children and secularism reflected in the reenchantment and the porous self in Victorian fantastic children's literature. Kimberley Reynolds' *Firing the Canon! Geoffrey Trease's Campaign for an Alternative Children's Canon in 1930s Britain* explores the seminal role of British author Geoffrey Trease's efforts to replace the traditional canon rooted in the pre-1914 assumptions and to provide new revolutionary reading material for children of the day. After hard work in the publication of a series of warmly-received children's books which were deeply informed by socialist ideologies, Trease was finally forced by his financial difficulties to dissociate from the left-wing publisher Martin Lawrence

³ *Ibid.*, p. 15.

⁴ *Ibid.*, p. 17.

and repositioned himself as a mainstream writer for children. However, his progressive visions and socialist ideas were still latent in his more popular works and exerted a profound impact on later works, therefore eventually and partially fulfilling his earlier promise to replace the traditional canon of children's literature by infiltrating from inside. Michael Düring's *Canon Formation in the Soviet Union: The Case of Swift as an Author of a Children's Classic*, coincidentally extends Reynolds' idea about Trease's enthusiasm about the instrumentalization of children's literature in Soviet Russia, and offers a wonderful case study of Jonathan Swift's *Gulliver's Travels* in the Soviet Union. Düring analyzes the three levels of canonization of Swift's masterpiece: 1) the critical reception process that paved for enthusiastic adaptation/translation of the novel for children, prompted by the «Father of Socialist Realism» Maxim Gorky's high evaluation of the novel and its potential for ideological citizenship education; 2) the translation of the novel for children, which culminated in the paradigmatic Soviet edition that entered the canon; 3) the Soviet series that retains an ambiguous attitude toward the original work and thus evaded instrumentalization for didactic purposes. The last chapter in this part, Anna Maria Czernow and Dorota Michułka's *Historical Twists and Turns in the Polish Canon of Children's Literature* discusses the Polish canon of children's literature from an educational perspective that witnesses historical changes. By tracing the turning points in the literary system and educational policies in the interwar period, the communist time and the present, Michułka successfully described the dynamics of Polish canon of children's literature that has been deeply influenced by social, literary and curricular changes.

Part II «The Challenges of the Canon: Genre, Gender, Avant-garde» tries to address challenges to the canon that come from different directions and at different times. Helene Høyrup's *The Origins of Modernism in Fairy Tale: Hans Christian Andersen's Authorship and Canon Studies* refreshes common perception of the famous author, who is often taken for granted to be recognized as an internationally famous writer of children's literature. However, Høyrup convincingly demonstrates the different reputations and thus the different theorizing status of Andersen in Denmark, where he is chiefly taken as an adult writer and not specifically related to children's literature, and in the Anglophone world, where his reputation as a children's literature writer undermines his critical studies, therefore demonstrating how the institutional age-segregation of literature affects critical studies. Bettina Kümmerling-Meibauer's *Canon and German Avant-garde Children's Literature of the 1920s and 1930s: A Paradoxical Relationship*, through the examples of Brecht, Grosz and Schwitters, endeavors to solve the paradoxical relationship between avant-garde and the canon of children's literature, often conceived as one looking into the future possibilities and one connected to the past. Instead, the author shows that, despite the uncontested impact of the avant-garde on children's literature as they ushered in innovative skills and narrative techniques, the radical position

of the avant-garde that attempts to strengthen the child's sovereignty hampers their recognition in the history, and thus in the canonization, of children literature. Etti Gordon Ginzburg's *Genre, Gender and Canon Formation: the Case of Laura Richards* delves into the hitherto often neglected realm of the genre of nonsense and compares the different fates and underlying causes of Edward Lear and the contemporary American female author Laura Elizabeth. She argues that Lear's poems address the construct of childhood and therefore are classified as literary nonsense, gaining him a place in the canon, whereas Richards' poems address the actual child reader and therefore remain to be regarded only as nonsense and neglected. Allison Waller's *Girls Like it Most: Challenging Gendered Canons and Paracanons in the Case of The Secret Garden* adopts a reading-history approach to discuss ways of reading and forms of interpretation in the case of Burnett's work, and argues that female readers' responses to the novel are not uniform and, moreover, male reader's experiences demonstrates a more complex phenomenon that has to take cross-reading into consideration, therefore calling for a more nuanced attitude when using gender terms to discuss reader experience.

The last thematic group, «Keeping the Gate-agents in Canon Formation», addresses a unique factor in canon studies of children's literature, which reflects a fundamentally important concept of power relation in the realm of children's literature. Sara Van den Bossche's *The Perks of Being Talked About: Norms of Evaluation Informing the Canonization of Astrid Lindgren's Oeuvre in the Dutch Language Area* applies diachronic approach focusing on the function of canonical works and synchronic approach foregrounding the specific characteristics of individual works to the canonization process of Lindgren's works, revealing a gradual trend moving from intrinsic elements towards a diachronic perspective. Anne Morey's *The Junior Literary Guild and the Making of New Canonical Works: the Case of Waterless Mountain* discusses the very topicality that has gained a canonical place for the book while at the same time leading to the brief durability of its canonicity. Aside from having intrinsic aesthetic values, the book is clearly connected to modernism, especially primitive art, and the liberal gender and racial politics of the moment, which complicates its address of child readers. Erica Hateley's *The Children's Book Council of Australia's Prizing of Picture Books in the Twenty-First Century* compares the selection of awards of picture books in the twentieth century and the twentieth-first century in Australia in relation to their representation and involvement in multiculturalism and aborigine culture, traces the historical change in the selection criteria, and describes the social and cultural function of the council in its decision of awards that considers artistic quality as well as, if not more importantly, the social functionality of picture books. The last chapter, *Finally Coming Together? The Bridging Role of the Adolescent Novel in the Netherlands* by Helma van Lierop-Debrauwer, picks up a topic that has been touched upon elsewhere in the collection about the dilemma of adolescent

literature, which is described by van Lierop-Debrauwer as bifurcation, as it belongs to the literary system of adult/mainstream literature and that of children's literature. As gatekeepers of literary critics and secondary school teachers conservatively tend to maintain the status quo, adolescent novels labeled in the former system have a better chance to be permitted into the canon, which is further reinforced by the role of literary institutions and gender politics. Thus the genre has the potential to bridge the two literary systems, which would further contribute to the process of canon formation.

The collection has obviously a wide international scope and genre-open-mindedness, which enables it to probe into diverse national, cultural, social, educational and political complexities that all participate, challenge or reinforce the processes of canon formation and canon change. The complexities and subtleties encountered in these processes help canon studies in children's literature to enhance its applicability and theoretic sophistication. In this sense, the collection has successfully and convincingly fulfilled its mission to further canon studies in the realm of children's literature with an awareness of the singularities of the canon of children's literature as distinct from that of mainstream literature. Therefore, the collection deserves warm recommendation for any scholar interested in canon studies in general, as well as those children's literature scholars who are engaged in national children's literature, cultural studies, or the prizing mechanism of literature.

Forum / Discussioni

Children's and youth literature in scientific journals: analysis and characterization using WoS and Scopus databases (1985-2017)

Araceli García-Rodríguez
Department of Library Science and
Documentation
University of Salamanca (Spain)
(araceli@usal.es)

Raquel Gómez-Díaz
Department of Library Science and
Documentation
University of Salamanca (Spain)
(rgomez@usal.es)

ABSTRACT: Though children's and youth literature (CYL) became an object of study towards the mid-twentieth century, the number of studies that measure the evolution of scientific production in this area is still limited. Thus, the purpose of this research is to analyse scientific production based on articles published between 1985 and 2017 cited in the WoS and SCOPUS databases to determine their relevance to the field of research. This is done by analysing production, country of origin, language of publication, concentration of production, degree of overlap, visibility, impact and most significant areas of knowledge. The results show that there is an increase in production, with a strong presence of authors linked to Anglo-Saxon institutions, as well as a rather low degree of visibility. The journals are mostly framed in the areas of language, linguistics and education, coinciding with the areas where the journals are best positioned.

EET/TEE KEYWORDS: Children's and youth literature; Scientific production on children's and youth literature; Journal; WoS; Scopus.

Introduction

Children's literature refers to literary works created to be read by children, a concept that usually encompasses young adults' literature as well, which is why the term children's and youth literature is customarily used (hereafter CYL). A broader definition would also include works written by children and young adults themselves, as well as texts, which, while not intended for children to be their main recipients, have been adopted by the latter over time¹.

The existence of CYL has only been recently acknowledged; in Spain, neither Calleja's prolific editorial work since the last quarter of the nineteenth century, nor the prominent presence in the editorial world of the first third of the twentieth century of renowned authors, were enough to admit the existence of a genre of literature for children. Its recognition became discernible when publishers showed an interest in publishing books specifically written for children and adolescents. However, although critique and research are essential in the area of literature for the assessment and judgement of styles, movements, authors, works, etc., and despite the unstoppable increase in the editorial production of CYL, studies on literary creations for children have been widely and generally disregarded by literary critique, history and philology², and even more so by academic research.

It could indeed be said that CYL became a subject of study and research from the second half of the twentieth century onwards³, although it is only in the current century that it is reaching its greatest development, with an increasing number of studies on authors, titles, genres, the use of CYL as a literacy resource, stereotypes, etc., research that is also addressed by disciplines such as education, philology, library science, psychology or fine arts.

Few studies have focused on the scientific production arising from research on CYL, although there are works on expert research resources such as those by Short⁴, Denham⁵ or Boland⁶, Wolf⁷ or Ruzicka Kenfel⁸. Outstanding in Spain

¹ P. Cerrillo, *Literatura infantil y educación literaria*, Barcelona, Octaedro, 2007.

² P. Cerrillo, C. Sánchez César, *Literatura con mayúsculas*, «Ocnos», vol. 2, n. 2, 2006, pp. 7-21.

³ See M. Selfa, *Estudios científicos sobre literatura infantil y su didáctica: revisión bibliográfica (2000-2014)*, «Ocnos», vol. 13, n. 1, 2015, pp. 65-84. <https://www.revista.uclm.es/index.php/ocnos/article/view/ocnos_2015.13.04/pdf> (last access: 03.01.2018).

⁴ K.G. Short, *Research & Professional Resources in Children's Literature: Piecing a Patchwork Quilt*, London, International Reading Association, 1995.

⁵ D. Denham, *Children's literature and libraries: A millennium review*, «New Review of Children's Literature and Librarianship», vol. 6, n. 1, 2006, pp. 193-206.

⁶ E. Boland, M. *Listas bibliográficas sobre literatura infantil y juvenil*, Madrid, CEP, 2009.

⁷ S. Wolf, et al., *Handbook of research on children's and young adult literature*, London, Routledge, 2011.

⁸ V. Ruzicka Kenfel, *New Trends in Children's Literature Research: 2000-2012*, Bern, Peter Lang, 2014; V. Ruzicka Kenfel et al., *Guía práctica sobre investigación en literatura infantil y juvenil en España*, Oviedo, Septem Ediciones, 2003.

are those by Etxaniz⁹ on theses, López and Cencerrado¹⁰, Cano¹¹, Mañá and Casas¹², Moreno and Sánchez¹³ and Cerrillo and Utanda¹⁴, on the weight of CYL in university studies, or that focused on Martos' research¹⁵ models. Also worth mentioning are the works by García-Padrino¹⁶, Children's and youth: current research trends¹⁷, Díaz-Plaja¹⁸, Vázquez¹⁹, or the report on teaching and research published by the Centre of Studies for the Promotion of Reading and Children's Literature²⁰ (CEPLI). Further additions to these are studies focused on research on CYL itself, such as those by Navas²¹, Cano and Mañá²² or Llorens²³, Selfa²⁴ and Lluch and Sánchez-García²⁵.

⁹ X. Etxaniz, *Research around Children and Youth Literature*, «Revista de Psicodidáctica», vol. 13, n. 2, 2008, pp. 97-109.

¹⁰ R. López, L.M. Cencerrado, *La literatura infantil y a tiene quien le escriba. Acercamiento al panorama de la investigación sobre literatura infantil y juvenil en España*, «Educación y Biblioteca», vol. 9, n. 82, 1997, pp. 58-64.

¹¹ I. Cano, *Tesis doctorales sobre literatura infantil*, Alacena, 1995, pp. 21-25.

¹² T. Mañá, I. Casas, *La investigación en LIJ: análisis bibliográfico*, «CLIJ. Cuadernos de Literatura Infantil y Juvenil», vol. 13, n. 123, 2000, pp. 44-49.

¹³ A. Moreno, L. Sánchez, Lourdes, *30 años de LIJ en las universidades españolas*, «CLIJ. Cuadernos de Literatura Infantil y Juvenil», vol. 13, n. 123, 2000, pp. 15-23.

¹⁴ P. Cerrillo, M.C. Utanda, *Literatura infantil y juvenil en la universidad*, «CLIJ. Cuadernos de Literatura Infantil y Juvenil», vol. 13, n. 123, 2000, pp. 24-28.

¹⁵ E. Martos, *La investigación en la universidad en literatura infantil y tecnologías de la información y la comunicación*. IN: M.C. Utanda et al. (coords), *Literatura infantil y educación literaria*, Cuenca, Universidad de Castilla-La Mancha, 2005, pp. 195-230.

¹⁶ J. García-Padrino, *La investigación de la literatura infantil en España: en busca de una identidad específica*, in J. García-Padrino, P. Cerrillo (coords.), *La Literatura infantil en el siglo XXI*, Cuenca, Universidad de Castilla-La Mancha, 2001, pp. 13-26.

¹⁷ *Literatura infantil y juvenil: tendencias actuales en investigación*, Vigo, Universidad de Vigo, 2000.

¹⁸ A. Díaz-Plaja, *Los estudios sobre literatura infantil y juvenil en los últimos años*, «Textos de didáctica de la lengua y la literatura», vol. 51, 2009, pp. 17-28.

¹⁹ C. Vázquez *Guía práctica sobre investigación en literatura infantil y juvenil en España*, Oviedo, Septem Ediciones, 2013.

²⁰ *Docencia, investigación y crítica de literatura infantil y juvenil en el marco Ibérico. Informe: 2004-2007*, Cuenca, CEPLI, 2008, <<http://www.usc.es/export9/sites/webinstitucional/gli/proyectos/lijmi/descargas/elinea2.pdf>> (last access: 15.01.2018).

²¹ G. Navas, *Investigación y literatura infantil, ¿necesidad de fundamentos para la acción?*, «Letras», vols. 54-55, 1997, pp. 217-248.

²² I. Cano, T. Mañá Terré, *La investigación en LIJ. Análisis bibliográfico*, «CLIJ. Cuadernos de Literatura Infantil y Juvenil», vol. 13, n. 123, 2000, pp. 44-49.

²³ R. Llorens, *La investigación en literatura infantil y juvenil: la asignatura pendiente*, in *Geografías Lectoras: nuevos proyectos y realidades en la lectura infantil y juvenil*, 9as. Jornadas de Bibliotecas Infantiles y Escolares, 14, 15 y 16 de junio, Salamanca, Fundación Germán Sánchez Ruipérez, 2001, pp. 77-83.

²⁴ Selfa, *Estudios científicos sobre literatura infantil y su didáctica: revisión bibliográfica (2000-2014)*, cit.

²⁵ G. Lluch, S. Sánchez-García, *La promoción de la lectura: un análisis crítico de los artículos de investigación*, «Revista española de Documentación Científica», vol. 40, n. 4, 2017. Recovered from: <<http://redc.revistas.csic.es/index.php/redc/article/view/996>> (last access: 27.01.2018).

Notwithstanding the value and relevance of the mentioned studies, often pioneering in this field, there is need for an update, a broadening of the thematic and chronological scope, on the presence of CYL in the field of scientific publishing based on articles gathered in high impact databases.

1. *Aims*

Given the growing interest in studies on CYL and the relevance that bibliometric studies are acquiring in the field of research, the purpose of this study is not only to carry out an analysis to characterize the publication of scientific articles on CYL between 1985 and 2017, using WoS and SCOPUS databases, but also to achieve the following:

- Test whether CYL is an object of research and publishing in scientific journals.
- Study and characterize scientific journals and their production.
- Identify the areas of knowledge where research on CYL is carried out.

2. *Methodology*

The first step was to localize the existing literature on CYL research, which was achieved by conducting a specific search both in general (ISOC, SCOPUS and WoS) and in specialized databases (LISA, LISTA, ERIC). The searches were complemented by tracking specialized journals that were not indexed in the databases, and also by searching Recolecta and Google Scholar.

The next stage was to define the type of information required to conduct the search and its purpose by selecting the indicators that would allow the characterization of the topic of study. The following were selected:

- Number of publications to gain insight on the evolution of scientific production over the analysed years, where it is visible and the weight of CYL in the area.
- Production by authors' countries of origin to determine where CYL is given more relevance in terms of research.
- Language of publication, which reveals the main language of publication on CYL.
- Concentration of production and overlap in databases: number of titles produced by each journal and their presence in databases.

- Visibility and impact taking into account availability in open access (henceforth OA) and presence and position in the JCR (*Journal Citation Report*) and SJR (*SCImago Journal Rank*) in the last 5 years.
- Areas of knowledge of the journals in the JCR and SJR.

One of the main difficulties when it comes to research on CYL involves the corpus to analyse (the eternal question of the definition and extent of the term, fortunately already figured out), but also the variety of disciplines from which it can be approached. Accordingly, the use of general databases that could accommodate all these different approaches was necessary, since choosing specialized sources such as ERIC would have introduced a considerable thematic bias. This led to the choice of WoS and SCOPUS, both internationally validated search and analysis tools in the area of social sciences and humanities, where CYL is traditionally found, but also in that of sciences, where, although to a lesser extent, there are also studies on the mentioned topic. Likewise, it should be noted that, despite their limitations, they provide the analysis tools required for the characterization of scientific production. Yet, although the scope and coverage of these two databases is different, between them they cover current scientific production, as noted by Meho and Yang²⁶.

The main WoS collection includes the *Science citation index* (SCI), *Social sciences citation index* (SSCI) and *Arts and humanities citation index* (AHCI) citation indices. The *Journal citation reports* (JCR), which excludes the AHCI, indexes over 10,800 journals of more than 2,550 publishers on approximately 232 disciplines from 83 countries. On the other hand, SCOPUS includes 22,283 journals, most of which are included in the *SCImago journal and country Rank*, featuring journal metrics, a tool that analyses the bibliometric impact of the journals in this repertoire²⁷.

The search conducted on 9 January 2018 was carried out using the following terms: («children's literature» OR «children and youth literature» OR «youth literature») OR («digital literature» AND (children OR young)).

Only the keywords field was used, since, when conducting the search, the title and summary fields proved to be sources of much noise. For example, the «children's literature» search included literature review papers on any child-related topic. It should also be noted that none of the databases had a thesaurus or an authorized list, so that keywords were author-assigned, which added extra difficulty to the search.

Articles were the only documentary type considered for being the document typology with the largest presence in databases. The time frame for the study

²⁶ L.I. Meho, K. Yang, *Impact of data sources on citation counts and rankings of LIS faculty: Web of science versus scopus and google scholar*, «Journal of the American Society for Information Science and Technology», vol. 58, n. 13, 2007, pp. 2015-2125, p. 3.

²⁷ M. Navas-Fernández, *La situación de las revistas a nivel internacional*, in E. Abadal (ed.), *Revistas científicas: situación actual y retos de futuro*, Barcelona, Edicions Universitat de Barcelona, 2017, pp. 35-52, <<http://hdl.handle.net/2445/117374>> (last access: 12.02.2018).

ranged from 1985 (when, at least in Spain, the editorial boom of children's and youth literature took place²⁸) until 2017. It should be noted that the time coverage of the two databases is different, although in both cases, articles are gradually included retrospectively. No linguistic nor geographic limits were set, since the purpose was to carry out research from an international perspective.

The result obtained was 265 articles in WoS and 603 in SCOPUS. The final number of documents after the removal of duplicates was 864.

Once the items had been recovered, as well as using the analysis tools of the sources used, they were exported to a new database of our own making to carry out the joint study of the articles. In this database, certain fields like journal names or ISSN (SCOPUS uses hyphens, whereas WoS does not) were normalized to conduct the joint analysis.

Indicators related to the journals were studied using JCR and SJR, from which information on the areas, their position in international rankings and the quartile of the last five years was drawn. The information on open access availability was completed using the *Directory of Open Access Journal* (DOAJ) and the journals' websites. Only open access to full journals was considered for the purposes of this study, not including articles available as single items.

3. Results and discussion

The search results have allowed us to establish certain trends in the scientific production of articles on CYL.

3.1. Number of publications

With regard to the evolution of production, the articles' publication dates were analysed both globally and in each of the databases.

The data obtained reveal that research on CYL started quite recently, since 76% of the articles were published over the last ten years, the highest number of works accumulating specifically in the 2015-2016 biennium. The upward trend begins in 2005, intensifying as from 2013, when eighty-two articles were published, a sustained growth that is maintained over the following years. The drop in production in 2017 could be due to the date when the searches were made (early 2018).

²⁸ In 1985 publishing increased by 22.3% and in 1986 by 10.8% with respect to the previous year, and the publishing of CYL was equivalent to 16.05% and 16.75% respectively of the total of national publishing. See A. García-Rodríguez, *Análisis estructural del subsector de la edición infantil y juvenil en Castilla y León: 1983-2000*, Salamanca, Universidad de Salamanca, 2011.

There are several explanations for this increase in production. First, the inclusion of CYL as a university subject: undergraduate courses, specific postgraduate studies and creation of research groups, with the consequent increase in the body of researchers. Another reason is the growth in the number of specialist journals in the fields of education, libraries and literature, which broadens the range of opportunities to publish articles on the topic. However, also to be taken into account is the possibility that this may be a result of the search for impact in publications, so that researchers choose those journals indexed by the most prestigious databases. Moreover, also in consonance with the preceding, in the Spanish case, the relative impact journal articles are gaining in accreditation and professional promotion systems should also be noted. Because the amount and, above all, the quality of the publications is one of the main elements, if not the most important, involved in the assessment of professional resumes, careful selection in what is published, and where it is published, is essential for researchers²⁹.

Knowledge of the databases that contain the largest number of publications in their field of research is one of the most practical concerns for researchers, especially when the topic of study is open to approaches from various disciplines. A comparison of the two databases that are the object of this study shows a similar trend in terms of number of publications, although when taking the number of articles as a reference, SCOPUS yields higher figures, with 71.5% against 31.4% for WoS. Nevertheless, the fact that 28.4% of the articles are not in SCOPUS justifies the need for searching both databases to elicit a fuller picture.

3.2. *Production by country of origin*

Articles' origins were approached taking the origin of the institution their authors are affiliated to (if there are authors from different countries, it is counted in both). Table 1 shows the production of articles of the fifteen countries with the highest number of articles.

SCOPUS % of production in SCOPUS			WOS	% production in WOS
US	237	39,30%	31	11,69%
United Kingdom	53	8,78%	10	3,77%
Spain	39	6,46%	19	7,16%
Australia	32	5,30%	4	1,50%
Turkey	25	4,14%	4	1,50%
Brazil	21	3,48%	17	6,41%
Canada	18	2,98%	4	1,50%

²⁹ J.A. Cerdón-García *et al.*, *Visibility of scientific monographs in the academic field: the institutional assessment of research*, in *Proceedings of 5th International Conference on Technological Ecosystems for Enhancing Multiculturality, TEEM 2017, Cádiz, 2017*.

South Africa	18	2,98%	6	2,26%
Italy	13	2,15%	19	7,16%
Not specified	12	1,9%		0
Iran	10	1,6%	2	0,75%
France	9	1,4%	17	6,41%
Slovenia	8	1,3%		
Portugal	8	1,3%	4	1,50%
Taiwán	8	1,32%	2	0,75%

Table 1. Percentage of production in the databases.

The topic of CYL is particularly visible in the United States, with 39% in SCOPUS and 11% in WoS. In the case of SCOPUS, the United Kingdom ranks second, while in WoS this place is taken by Spain and Italy, with the same percentage. These results are as might be expected, given that the United States is responsible for 20.7% of the world production of scientific articles³⁰.

When the two databases are compared taking into account only those works by authors linked to Spanish institutions, the presence in SCOPUS is greater, with thirty-nine papers against the nineteen in WoS, although the percentage is similar in both of them. The figures show that authors linked to Spanish institutions rank well on the subject of CYL, there being a greater number in SCOPUS could be a result of both chronological and geographical coverage.

In terms of the Spanish journals that contribute the most articles, in SCOPUS they are «Ocnos» (18) and «America sin Nombre» (3), and in WoS it is «Ocnos» (3), considering that the latter was entered into this database in November 2017 and only the last two years are counted, data that confirm that national journals have a greater presence in SCOPUS³¹.

3.3. *Language of publication*

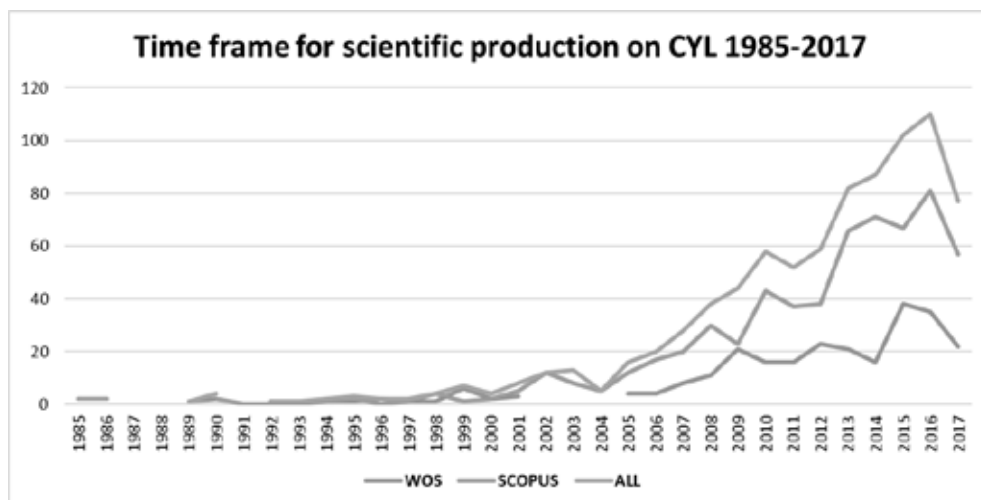
With regard to language, it should be noted that the resulting numbers are not just related to the authors' origin, but also to the journals' language of publication and to the presence of those that only publish in a specific language.

English is the majority language in both databases, 82% in SCOPUS against 32% in WoS, a pattern similar to that of the rest of topics, since, currently, 64.2% of journals are published in English³². Beyond this, the position each language ranks varies. While in SCOPUS Spanish (7%) ranks second place (although it must

³⁰ M. Navas-Fernández, *La situación de las revistas a nivel internacional*, cit. p. 43.

³¹ Somoza et. al., *Presencia de las revistas españolas en bases de datos internacionales*, in E. Abadal (ed.), *Revistas científicas: situación actual y retos de futuro*, Barcelona, Ediciones Universitat de Barcelona, 2017, pp. 161-180, <<http://hdl.handle.net/2445/117374>> (last access: 12.02.2018).

³² Navas-Fernández, *La situación de las revistas a nivel internacional*, cit.



Pic. 1. Time frame for scientific production on CYL 1985-2017. Prepared by the authors.

be noted that the presence of Spanish journals is greater in this case)³³, in WoS such position is occupied by Korean (28%), a language that does not feature in SCOPUS, this datum being mainly due to the important number of Korean journals included in this database.

Languages of articles	SCOPUS	Languages of articles	WOS [2]
English	499	English	87
Spanish	44	Korean	75
Portuguese	24	Spanish	30
Turkish	18	French	20
Italian	8	Portuguese	15
Slovene	4	Italian	12
Polach	2	Ruse	9
Afrikaner	1	German	5
Bosnian	1	Polach	4
Ruse	1	Turkish	3
German	1	Afrikaner	2
Chino	1	Dutch	2
Catalan	1	Chinese	2
Croatiaa	1	Slovak	1
Arabic	1	Not specified	1

Table 2. Languages in the databases.

³³ Somoza *et. al.*, *Presencia de las revistas españolas en bases de datos internacionales*, cit.

3.4. Concentration of production and overlap in the databases

Another interesting datum to learn is whether production is concentrated in few journals or if it is scattered. Figure 2 shows how only ten journals total 345 articles out of the 846, which accounts for practically 40% of the total production, therefore making it possible to speak of a high concentration of publication in few titles.

Considering the fifteen publications³⁴ with more articles, the top five positions would correspond to «Children's Literature and Education», «Reading Teacher», «History of Education & Children's Literature», «Early Childhood Education Journal» and the Spanish journal «Ocnos».

Journals	All	SCOPUS	WOS
Children's Literature in Education	54	54	1
Reading Teacher	48	48	
History of Education & Children's Literature	29	10	29
Early Childhood Education Journal	25	25	
OCNOS	20	21	5
International Research in Children's Literature	15	14	2
Meta	11	11	
Milli Egitim	10	10	
Literacy	9	9	
The Korea Association of Literature for Children and Young Adult	9		9
Environmental Education Research	8	8	
Korea Children's Literature	7		7
Literacy Research and Instruction	7	7	
English Teaching	6	6	
Sex Roles	6	6	

Table 3. Journals with the highest number of articles.

The overlap index³⁵ is a calculation of the degree of similarity among a group of databases, namely, how they cover the same information³⁶. This is

³⁴ The selection only includes the fifteen most productive journals, since the number of articles in the rest of them is very small.

³⁵ See R. Costas, L. Moreno, M. Bordons, *Solapamiento y singularidad de MEDLINE, WoS e IME para el análisis de la actividad científica de una región en Ciencias de la Salud*, «Revista Española de Documentación Científica», vol. 31, n. 3, 2008, pp. 327-343, <<http://redc.revistas.csic.es/index.php/redc/article/viewArticle/432>> (last access: 15.02.2018).

³⁶ A. Pulgarín Guerrero, I. Escalona Fernández, *Medidas del solapamiento en tres bases de datos con información sobre ingeniería*, «Anales de Documentación», vol. 10, 2008, pp. 335-344,

In this case, two aspects that can be easily and quickly obtained from the available sources have been considered: availability in OA and presence and rank position in the JCR and the SJR. This does not preclude the possibility of using of other metrics such as presence in repositories or academic social networks, which, although essential to the new model of scientific communication, as observed by Aparicio, Banzato y Liberatore, are beyond the scope of this study.

3.5.1. *Journal's availability in OA*

Dissemination of scientific production is the final stage of all research projects, and OA is one of the ways to achieve it. OA increases journals' chances of visibility, dissemination and discoverability, leading to a rise in the number of citations and enhanced status³⁸, but it is also a new way of conceiving knowledge generation and transfer³⁹.

As far as the subject of this study is concerned, figures are not encouraging, since out of the fifteen journals where more articles on the topic are published, according to the data recorded in the DOAJ, only one of them, «Ocnos» in this case, is in OA, and another two, «Children's Literature in Education» and «History of Education & Children's Literature» have a few of their numbers in OA.

These data give ground to state that, despite the fact that the number of journals available in OA is growing⁴⁰, in the particular case of CYL we are far from achieving the universal access that this movement advocates, which no doubt undermines the visibility and dissemination of a subject that is so much in need of becoming known and reaching scientific status.

If we add the fact that many of the journals on the topic are either labelled as general outreach, or do not meet the necessary requirements to be incorporated into SCOPUS and WoS, there are even stronger grounds to speak of the invisibility of CYL in research.

Manual_PISAC.pdf.> (last access: 27.02.2018).

³⁸ E. Abadal, L. Rius Alcaraz, *Revistas científicas de las universidades españolas: acciones básicas para aumentar su difusión e impacto*, «Revista española de documentación científica», vol. 31, n. 2, 2008, pp. 240-260, <<http://redc.revistas.csic.es/index.php/redc/article/viewArticle/427>> (last access: 31.01.2018).

³⁹ R. Melero, J. Hernández-San Miguel, *Acceso abierto a los datos de investigación, una vía hacia la colaboración científica*, «Revista española de documentación científica», vol. 37, n. 4, 2014, <<http://redc.revistas.csic.es/index.php/redc/article/view/869/1175>> (last access: 07.03.2018).

⁴⁰ *Analytical Support for Bibliometrics Indicators Open access availability of scientific publications*, Montreal, Science-Metrix, 2018, <goo.gl/YEc4ni> (last access: 18.01.2018)

3.5.2. Presence and position in the JCR and SJR

Another of the commonly used criteria to determine a journal's visibility is its presence in the internationally acknowledged JCR and SJR rankings. Once again, the basis for this purpose were the five most recent years with available data (2012-2016) ⁴¹ for the fifteen most productive journals (Table 3). Only three of these are in the JCR (Table 4) and ten in the SJR (Table 5). In the first case, the reason for low presence can be explained by the fact that the area of humanities is weak on such index.

Journal	JCR 2012	JRC 2013	JCR 2014	JCR 2014	JRC 2015	JRC 2016	Area of best positioning in JCR*
Literacy	Q3	Q3	Q3	Q3	Q2	Q3	Linguistic
Reading Teacher	Q4	Q3	Q2	Q2	Q3	Q3	Education and Educational Research
Sex Roles	Q3	Q2	Q2	Q2	Q2	Q2	Social Psychology Social**

*Also classified in Education and Educational Research, every year in Q4 except 2015 which is in Q3.

** This magazine is also included in Psychological Development where it appears in Q3 for the years 2012 and 2015) and Women's Studies, classified in Q1 in 2015 and 2016, in the previous years it was not included in this area.

Table 4. Journals included in the JCR with area of best positionin.

Journal	SJR 2012	SJR 2013	SJR 2014	SJR 2015	SJR 2016	Area of best positioning in SJR
Children's Literature in Education	Q2	Q2	Q2	Q2	Q3	Language and linguistics*
Early Childhood Education Journal	Q2	Q2	Q2	Q2	Q2	Education**
History of Education and Children's Literature	Q3	Q3	Q3	Q3	Q3	History and y Philosophy of science***
International Research in Children S Literature	Q3	Q2	Q1	Q1	Q2	Literature and Theory of literature

⁴¹ The data for 2017 were not available at the time of this study.

Literacy	Q1	Q1	Q2	Q1	Q1	Language and Linguistics****
Meta	Q3	Q3	Q3	Q2	Q3	Philosophy
Milli Egitim	Q4	Q4	Q4	Q4	Q4	Education
Ocnos	Q1	Q1	Q1	Q1	Q1	Literature and Theory of literature
Reading Teacher	Q1	Q1	Q1	Q1	Q1	Language and linguistics*****
Sex Roles	Q1	Q1	Q1	Q1	Q1	Social Psychology*****

* Also classified in Education, every year in Q3 except 2016 which is Q4.

** Also classified in Development and Educational Psychology, Q3.

*** Also classified in Education 2012, 2013 and 2016 in Q4 and 2014 and 2015 in Education

**** Also in Education (q2 every year)

***** Also classified in Pharmacology Also in Gender Studies (both appear in Q1) and in Development and Educational Psychology

***** Also in Gender Studies (both appear in Q1) and in Development and Educational Psychology.

Table 5. Journals included in the SJR with area of best positioning

With regard to areas of expertise, the best positioned journals in the SJR belong to the field of language and linguistics, appearing in Q1/Q2 depending on the year. In second place is education, mainly Q2. These data can be explained by the fact that the SJR not only contemplates a larger number of publications, but also of subject matters, with a larger presence of humanities and social sciences, typical areas for the publication of CYL.

3.6. *Areas of expertise in the JCR and SJR*

Since CYL can be studied from a variety of approaches, it is advisable to be aware of the specialist areas of the different journals, which is a difficult datum to analyse using a comparative method, since both databases do not address the same thematic areas and, moreover, in SCOPUS they are more generic than in WoS. In the former, the main subject areas are social sciences (49%), arts and humanities (26%) and psychology (6%), while in the latter they are literature (31%), paediatrics (16%) and education (14%).

This leads to the already mentioned conclusion of CYL's multidisciplinary nature, which will make it necessary for researchers to consult both databases and complete the search with other specific ones, chiefly those specialized in education, like ERIC, and in literature, like MLA.

Conclusions

Over the last 30 years, there has been a considerable increase in the volume of scientific publication on CYL, an upwards trend that could contribute to its consolidation as a subject of study and, correspondingly, increase its presence in scientific journals and in the databases that gather them, thus granting it scientific status.

This production is characterized by significant concentration in a reduced number of journals and by scarce visibility considering availability in OA, which is one of the challenges CYL must tackle using additional dissemination tools (*networking*) to achieve not only scientific visibility, but also social impact. This is what López-Borrull⁴² calls academic marketing, something that should be undertaken by both specialist journals themselves, and by the authors and institutions they are linked to.

Authors belonging to institutions from the Anglo Saxon academic world who write in English stand out above the others, although it is an actual fact that Spain is making increasingly better progress since 2006.

Although it depends on the database, the journals that publish works on CYL mainly appear included in the areas of language and linguistics and education, which are precisely the ones that rank higher. There are also studies framed in library science, philosophy, arts or even medicine, which reflects the variety of approaches from which it can be addressed, also making it necessary to consult, if not looking for a specific perspective, general databases such as WoS and SCOPUS.

If these two databases are contrasted against each other, it can be stated that there is a greater presence of articles in WoS, although both of them should be regarded as complementary. Likewise, awareness should also be drawn to the fact that it is advisable to consult other databases specialized in documentary science, education, or social sciences and humanities, especially when searching for articles in Spanish or by Spanish authors.

We could therefore conclude by venturing that this study contributes new data and offers a bibliometric approach to a subject on which there are scarce studies and which is poorly represented in databases, impact indices, etc. Moreover, it completes and updates the existing work on the topic, opening new avenues for research, among which, considering the importance of monographs, theses and contributions to conferences as channels for the dissemination of social sciences, it is of utmost importance to learn the real impact of research.

⁴² A. López-Borrull, *Retos de la comunicación científica*, «Anuario ThinkEpi», vol. 8, 2013, pp. 198-202, <<http://www.thinkepi.net/retos-de-la-comunicacion-cientifica>> (last access: 26.02.2018).

Per una storia dell'esperienza magistrale in Italia tra Otto e Novecento: il caso della maestra elementare marchigiana Maria Riccini (1892-1975) tra nuove fonti e nuove metodologie di indagine*

Anna Ascenzi
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
anna.ascenzi@unimc.it

Elisabetta Patrizi
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
elisabetta.patrizi@unimc.it

A history of the teaching experience in Italy between the Nineteenth and Twentieth centuries: a case study of Maria Riccini (1892-1975), a primary school teacher from the Marche, based on new sources and new methods of investigation

ABSTRACT: In recent years, research in the historical-educational field has greatly expanded the spectrum of sources used to reconstruct the history of teaching in an effort to gain a deeper understanding of the true scholastic experience. To this end, the authors believe that the examination of teachers' personal archives and libraries can provide a new contribution to the progress of studies in this sector. Proffering an initial overview of the results of their investigation, still scarce and in a certain sense entirely new to this field of research, the authors have focused on a very unique case study: the documentary and bibliographic archives of primary school teacher Maria Riccini (Ancona 1892-

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1975), preserved at the University of Macerata's Centre for documentation and research on the history of schoolbooks and children's literature. The purpose of this paper is to reconstruct, for the first time, the experiential journey of a specific teacher through a series of indisputably significant sources: her personal library, consisting of training texts (pedagogical and didactic manuals, disciplinary manuals from the normal school, etc.), texts adopted for teaching and continuing education (school textbooks and reading books for primary school students, teaching journals, and cultural magazines); her personal archives, containing documents related to her own didactic work (teaching programs, notes and summaries used for conducting lessons, notebooks with newspaper clippings collected for educational purposes, etc.), and materials produced by the students (dictated texts, essays, exercises, drawings, etc.). The novelty of the approach adopted in analysing this variegated set of sources consists in having cross-referenced and re-read them within the framework of a historical reconstruction that aims to insert the human and professional history of Riccini into the historical-cultural and historical-scholastic context in which she lived and worked, intertwining her life's work with the significant eras that defined the nation's history, from fascism to the post-World War II period. It is, therefore, a «story seen from within», which does not speak of an abstract category of teachers, but rather of a specific teacher, her contribution and her direct educational impact, in order to provide a new historiographical perspective on the history of teaching.

EET/TEE KEYWORDS: Primary school teachers; Teachers' archives and libraries; Educational practices; Italy; 20th Century.

Introduzione

Il presente contributo intende focalizzare la propria attenzione sulle biblioteche e sugli archivi personali degli insegnanti. Si tratta di risorse per la ricerca fino ad ora poco utilizzate, almeno in Italia, sia per le inevitabili difficoltà di conservazione che questa particolare tipologia di fonte comporta, che per le problematiche inerenti all'analisi interna delle stesse. Quando parliamo di biblioteche e archivi personali degli insegnanti, infatti, intendiamo riferirci a un insieme di fonti molto eterogeneo, non solo di carattere librario e documentale, ma anche materiale, che appare come il precipitato diretto dell'esercizio della professione. Si tratta, solitamente, di strumenti e materiali di lavoro che, nei casi più fortunati, spaziano dalle testimonianze di carattere autobiografico (memorie, diari, appunti personali, corrispondenza etc.) ai registri, diari e cronache di classe; dai manuali scolastici studiati ed adottati dall'insegnante ai sussidi didattici che ne hanno accompagnato l'attività professionale (cartelloni e manifesti a stampa o realizzati a mano, alfabetieri, filmine didattiche, doni froebeliani etc.); dai più semplici elementi di corredo professionale (pennini, cannucce, boccette d'inchiostro, penne, matite etc.) ai quaderni ed elaborati prodotti da diverse generazioni di studenti. Analizzare una biblioteca-archivio magistrale nella sua interezza, come ben sin intuisce, significa aprire una finestra sulle pratiche educative del passato; significa avere

l'opportunità di comprendere come la normativa sulla scuola è stata realmente interpretata e applicata; significa, infine, dare dei volti e dei nomi agli eventi che hanno caratterizzato la storia della scuola e dell'educazione passata, provando ad intrecciare i macro-scenari nazionali alle storie quotidiane di vita scolastica concretamente fatta e agita.

La storiografia ci ha consegnato pagine importanti sulle biblioteche dei grandi intellettuali del passato che si sono cimentati nel campo dell'educazione e della riflessione pedagogica, come Silvio Antoniano, Severino Fabriani e Giovanni Gentile, solo per citare alcuni nomi significativi del contesto italiano¹, ma ha ignorato in larga misura quelle appartenenti a figure intellettuali di minor rilievo come gli insegnanti, «umili e silenziosi operai della scuola e dell'alfabeto»², che pure meriterebbero una particolare attenzione per l'impatto fondamentale che l'esercizio della loro professione ha avuto nella vita dei singoli e delle comunità in cui hanno operato³. Fino ad ora la letteratura di settore ci ha abituato a profili biografici di insegnanti ricostruiti con l'ausilio di fonti reperite dagli archivi pubblici (scolastici, comunali, statali)⁴, attraverso l'analisi delle pubblicazioni periodiche professionali⁵ e, più recentemente, attraverso le memorie magistrali⁶. Pochi sono i casi in cui ci si è giovati delle

¹ Cfr. R. Sani, P.P. Saladini, *Severino Fabriani: un ecclesiastico ed educatore nella Modena della restaurazione*, Roma, Città Nuova, 2001; E. Patrizi, *Del congiungere le gemme de' gentili con la sapientia de' christiani: la biblioteca del card. Silvio Antoniano tra studia humanitatis e cultura ecclesiastica*, Firenze, Olschki, 2011; G. Colli et al., *La biblioteca privata di Giovanni Gentile: giornata di presentazione delle attività di valorizzazione e di promozione della fruizione realizzate presso la Biblioteca di filosofia di Sapienza-Università di Roma*, 17 giugno 2015: atti, Roma, Vecchiarelli, 2017.

² A. Ascenzi, R. Sani, *Oscuri martiri, eroi del dovere: memoria e celebrazione del maestro elementare attraverso i necrologi pubblicati sulle riviste didattiche e magistrali nel primo secolo dell'Italia unita (1861-1961)*, Milano, FrancoAngeli, 2016, p. 11.

³ Cfr. G. Chiosso, R. Sani, *Presentazione*, in Idd. (edd.), *DBE: Dizionario biografico dell'educazione*, 2 vols., Milano, Editrice Bibliografica, 2013, vol. 1, pp. VII-X, ora disponibile anche online <<http://dbe.editricebibliografica.it/dbe/ricerche.html>> (ultimo accesso 03.06.2018).

⁴ Basti ricordare, a questo proposito, il mirabile lavoro compiuto da Carla Ghizzoni che ha sopperito alla mancanza dell'archivio personale di Maria Magnocavallo, attingendo ad un ampio spettro di fonti inedite o scarsamente indagate reperite presso numerosi archivi e biblioteche milanesi e nazionali. C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La scuola, 2005. Interessante anche la ricostruzione della vicenda umana e professionale della maestra Elvira Bono compiuta da Maria Cristina Morandini sulla base del materiale manoscritto e a stampa conservato presso l'Archivio storico del Comune di Torino, inerente le procedure di reclutamento e di prosecuzione di carriera del personale docente. M.C. Morandini, *La maestra in Italia tra Otto e Novecento: il caso torinese di Elvira Bono*, «Rivista di storia dell'educazione», 1, 2018, pp. 173-190.

⁵ Si pensi, ad esempio, al sapiente uso che è stato fatto dei necrologi pubblicati nelle più importanti riviste magistrali italiane tra Unità e secondo dopoguerra, per tratteggiare l'evoluzione che ha caratterizzato il modello di insegnante e di dirigente scolastico in un secolo di storia della penisola: Ascenzi, Sani, *Oscuri martiri, eroi del dovere*, cit.

⁶ Sulle memorie magistrali abbiamo ormai a disposizione una nutrita bibliografia. L'importanza di questa categoria di fonti è stata al centro di un recente convegno *School Memories. New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues*, che si

carte personali degli insegnanti⁷. Allora quale dovrebbe essere il valore aggiunto dato dalle biblioteche e dagli archivi personali degli insegnanti? Bene, a nostro avviso, queste meritano di essere annoverate a pieno titolo nell'alveo di quelle "nuove fonti" sulle quali la ricerca storico-educativa si sta orientando negli ultimi anni, in quanto consentono di implementare il quadro delle informazioni utili a ricostruire non solo l'evoluzione della figura e del ruolo dell'insegnante nella storia culturale, sociale e scolastica di un Paese, ma anche e soprattutto di restituire uno sguardo diretto sulle reali prassi educative del passato⁸.

Per dimostrare le potenzialità euristiche delle biblioteche-archivi magistrali ci avvarremo del Fondo documentario e bibliografico Maria Riccini, depositato presso il Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia dell'Università di Macerata nel 2007⁹. Rappresenta il primo fondo di questa tipologia accolto nel Centro e ed è, a tutt'oggi, uno dei più ricchi nel suo genere, sia per la quantità che per la varietà dei materiali in esso accolti, così come per il periodo storico che abbraccia, in quanto presenta materiali che vanno dai primi del Novecento agli anni Settanta del secolo scorso. Si va a coprire, infatti, un arco cronologico piuttosto esteso e anche

è svolto a Siviglia nel settembre del 2015 e che ha permesso di fare il punto sul concetto stesso di memorie scolastiche, sulle diverse sotto-tipologie e sulle metodologie di indagine. Alcuni dei contributi presentati al convegno sono ora disponibile nel volume curato da C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017. Per una riflessione sull'utilizzo delle memorie magistrali come strumento per ricostruire il percorso professionale degli insegnanti ci permettiamo di rimandare a A. Ascenzi, E. Patrizi, *Inside School Lives: Historiographical Perspectives and Case Studies. Teachers' Memories Preserved at the Centre for Documentation and Research on the History of Schoolbooks and Children's Literature*, «Espacio, Tiempo y Educación», vol. 3, n. 1, 2016, pp. 343-362.

⁷ Si può ricordare, a questo riguardo, lo studio compiuto da Mirella D'Ascenzo sulle carte personali del maestro e poi direttore didattico Alberto Calderara (1882-1938), conservate presso la Biblioteca del Dipartimento di Scienze dell'Educazione di Bologna. Si tratta di un lavoro pionieristico nel suo genere, in quanto sviluppato sulle carte private di Calderara, su diari personali, giornali di classe, opuscoli, ritagli di giornale e relazioni finali dell'insegnante bolognese. M. D'Ascenzo, *Alberto Calderara. Microstoria di una professione docente tra Otto e Novecento*, Bologna, CLUEB, 2011. Più recentemente, sempre Mirella D'Ascenzo, questa volta insieme a Gabriele Ventura, ha curato una pubblicazione basata su carte legate alla concreta attività didattica di un insegnante, facciamo riferimento al lavoro dedicato a Virginia Predieri, maestra di scuola dell'infanzia nel Comune di Bologna nel secondo dopoguerra: M. D'Ascenzo, G. Ventura, *Dalla parte delle maestre. La stagione pedagogica di Virginia Predieri (1931-2009)*, Lecce, Pensa Multimedia, 2016.

⁸ Per una panoramica sulle 'nuove fonti' in uso nell'ambito storico-educativo e sul relativo approccio metodologico cfr.: M. Depeape, F. Simon, *Sources in the Making of History of Education: Proofs, Arguments and Other Forms of Reasoning from the Historian's Workplace*, in M. Depeape (Ed.), *Between education and appropriation. Selected Writings on the history of modern educational systems*, Leuven, Leuven University Press, 2012, pp. 477-496.

⁹ Sul Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia, d'ora in poi CESCO, si rimanda a: M. Brunelli, *The «Centre for the documentation and research on the history of textbooks and children's literature» in University of Macerata (Italy)*, «History of Education & Children's Literature», vol. 4, n. 2, 2009, pp. 441-452. Per una prima panoramica sui fondi conservati nel CESCO si veda: Ascenzi, Patrizi, *Inside School Lives*, cit., pp. 346-352.

molto complesso della storia italiana, in quanto attraversa l'età giolittiana, il Ventennio fascista e i primi anni della democrazia repubblicana; attraversando, pertanto, diverse fasi di transizione della storia nazionale, che hanno visto il consolidamento dello Stato unitario, gli inizi, gli sviluppi e la decadenza del regime totalitario e, infine, l'avvento della stagione democratica¹⁰.

1. *Il fondo documentario e bibliografico Maria Riccini*

Maria Riccini nasce ad Ancona nel 1892, si diploma presso la Scuola normale «Caterina Franceschi Ferrucci» della sua città nel giugno del 1910. Inizia ad insegnare prestissimo, sin dal 1911, presso le Scuole rurali del territorio anconetano, ma il suo amore per l'insegnamento la porta a decidere di proseguire gli studi. Così nel 1919 consegue il diploma di abilitazione all'insegnamento della calligrafia ad Ascoli Piceno e tra il 1919 e il 1923 frequenta il corso di perfezionamento per i licenziati dalle scuole normali presso l'Università di Bologna. La Riccini, pertanto, affronta anche l'esperienza universitaria e tale corso, noto anche come «Scuola pedagogica», le permette di soddisfare quella legittima aspirazione all'avanzamento di carriera, che anima la classe docente dell'età giolittiana¹¹.

A partire dal 1930 inizia ad insegnare presso le scuole urbane di Ancona. Lavora per un anno presso la scuola elementare «Benincasa» poi, nel 1931 passa alla scuola elementare «Mazzini», dove rimarrà per 27 anni fino al pensionamento, arrivato nel 1958. Muore nel 1975, trascorrendo gli ultimi anni della sua vita a riordinare memorie e carte di scuola, da gelosa e attenta custode di un passato che possiamo immaginare avesse intuito essere preziosa testimonianza per i posteri¹².

¹⁰ Sulla categoria storiografica di transizione si veda: K. Mahamud Angulo, A. Ascenzi, *Textbooks in Periods of Political Transition after the Second World War*, «Journal of Educational Media, Memory, and Society», vol. 9, n. 1, 2017, pp. 1-16.

¹¹ Dell'imponente letteratura sulla formazione degli insegnanti di scuola elementare ci limitiamo a segnalare solo alcuni dei lavori divenuti ormai 'classici' relativi al contesto italiano: C. Covato, A.M. Sorge (ed.), *L'istruzione normale dalla legge Casati all'età giolittiana*, Roma, Ministero per i beni culturali e ambientali – Ufficio centrale per i beni archivistici, 1994; T. Bertilotti, *Tra offerta istituzionale e domanda sociale: le scuole normali dall'Unità alla «crisi magistrale»*, «Annali di storia dell'educazione e delle istituzioni scolastiche», 1995, 2, pp. 379-282; G. Genovesi, P. Russo (edd.), *La formazione del maestro in Italia*, Ferrara, Corso editore, 1996; R.S. Di Pol, *Cultura pedagogica e professionalità nella formazione del maestro italiano. Dal Risorgimento ai giorni nostri*, Torino, Sintagma, 1998. Sul caso specifico delle 'Scuole pedagogiche', istituite con R.D. n. 29 del 19 gennaio 1905, si veda la sezione monografica del decimo numero degli «Annali della storia e delle istituzioni scolastiche» del quale si segnala, in particolare, il contributo che tratta il caso della Scuola bolognese: M. D'Ascenzo, *La Scuola pedagogica di Bologna*, «Annali della storia e delle istituzioni scolastiche», vol. 10, 2003, pp. 201-242.

¹² Una prima ed attenta ricostruzione della biografia di Maria Riccini è stata oggetto di

Il *fondo Riccini* è stato oggetto di un accurato progetto di catalogazione che ha coinvolto un gruppo di studentesse della vecchia Facoltà di Scienze della Formazione dell'Università di Macerata. Il progetto ha permesso di riordinare il vasto ed eterogeneo materiale accolto nel fondo secondo dieci categorie, che restituiscono una prima efficace istantanea sulle molteplici risorse interpretative offerte dallo stesso: I libri, II estratti, III articoli, IV materiale a stampa, V periodici, VI sussidi didattici, VII materiale documentario non a stampa, VIII immagini, IX leggi e circolari, X giocattoli.

Per dare un'idea delle 'dimensioni' del fondo è utile offrire qualche dato. Esso accoglie: 816 volumi relativi a 774 monografie¹³; 200 articoli sciolti tratti per gran parte da autorevoli periodici magistrali; 143 materiali a stampa di carattere vario (opuscoli, raccolte di articoli a scopo didattico, pubblicazioni occasionali promosse da enti locali etc.); oltre 300 numeri di periodici legati all'attività professionale e al contesto marchigiano; 120 sussidi didattici di diversa tipologia (cartine geografiche a stampa e realizzate a mano, manifesti murali, sussidi per il disegno e la pittura etc.); oltre 200 documenti non a stampa (corrispondenza personale, appunti di lavoro, quaderni disciplinari, programmi e cronache scolastiche, materiali scolastici prodotti dagli alunni)¹⁴; 238 immagini (cartoline, santini, copertine di quaderni), una piccola raccolta di leggi comprendente 5 documenti (il codice penale del Regno d'Italia del 1889, la carta del lavoro del 1927, la costituzione italiana, due progetti di legge inerenti lo status giuridico-economico degli insegnanti della scuola elementare, datati 1955 e 1956) e due giochi di un certo interesse (il gioco da tavolo *Alfabeto e numeri* e le costruzioni *Impariamo a fare i cesti*).

Appare importante, ai fini della presente ricerca, focalizzare la nostra attenzione sulle categorie del fondo più nutrite in termini numerici, in quanto offrono svariati spunti di riflessione inerenti l'orientamento culturale, la formazione e la pratica professionale della Riccini. Ci concentreremo, pertanto, sulle seguenti categorie dell'inventario: libri articoli, periodici e materiale documentario non a stampa.

una tesi di laurea discussa dalla dottoressa Perini nel a.a. 2008-2009: F. Perini, *Maria Riccini. Biografia intellettuale e professionale di una insegnante (1910-1952)*, Corso di laurea in Scienze della Formazione Primaria, Tesi di laurea in Storia dell'educazione, a.a. 2008-2009. La ricerca della Perini è stata condotta principalmente sui documenti conservati presso l'Archivio dell'Istituto Comprensivo «A. Novelli» di Ancona, nel quale è confluito l'archivio della scuola «Mazzini» presso la quale la Riccini insegnò per la maggior parte della sua carriera. Le informazioni raccolte dalla Perini sono state confrontate con quelle desunte dal fascicolo di *Documenti personali* della Riccini presente nel fondo della maestra depositato presso il CESCO. Si tratta, per lo più, di documenti stilati dalla maestra per una ricostruzione della carriera ai fini pensionistici, dai quali possiamo evincere le principali vicende formative e professionali della Riccini.

¹³ Va precisato che di queste 774 monografie, 12 sono inerenti a opere in più volumi e 64 ad opere in pessimo stato di conservazione e difficilmente riconoscibili.

¹⁴ Purtroppo questa sezione del fondo, come si avrà modo di spiegare nel corso dell'articolo, è stata oggetto di un'avventata operazione di scarto inventariale che ha portato alla perdita di molti materiali di lavoro, in particolare quaderni di appunti e giornali della classe, redatti dalla Riccini.

2. *La stampa magistrale: un strumento di affiancamento prezioso*

Nel *fondo Riccini* sono conservati diversi articoli sciolti e singoli fascicoli di periodici. Se ci concentriamo sui periodici, notiamo innanzitutto la grande varietà di testate rappresentate. Abbiamo 322 fascicoli di riviste e 74 testate riferibili ad un arco cronologico molto vasto, che va dai primi del Novecento all'anno della morte della Riccini (1975). Le testate sono riconducibili a tre principali ambiti di interesse professionale e personale. Uno è quello legato alla sfera religiosa, alla fede e all'attività missionaria, rappresentato da riviste come «Famiglia cristiana», «Eco dell'Africa», «Eco di S. Gabriele» e «Voce francescana». Un secondo polo di interesse è legato alla cronaca locale e nazionale, rappresentata da quotidiani marchigiani quali «Voce adriatica» e «Vita marchigiana» e da testate nazionali come la «Domenica del corriere». La maggior parte dei periodici, però, è riconducibile al mondo della scuola e, in particolare, troviamo tre riviste che si distinguono dalle altre per la consistenza dei numeri conservati: «Scuola Italiana Moderna» con 37 fascicoli che interessano un arco cronologico ampio (dal 1923 al 1974); «Il maestro. Quindicinale della Associazione Italiana Maestri Cattolici» con 21 numeri che coprono gli anni 1951, 1953, 1972-1975; e «Il Balilla» con 20 numeri tutti riferibili agli anni Trenta del Novecento. Vale la pena, per il tema di nostro interesse, di soffermarsi sui periodici magistrali presenti nel *fondo Riccini*.

Due di questi confermano l'orientamento ideologico-culturale della maestra anconetana: «Scuola Italiana Moderna» e «Il maestro», entrambi espressione degli ambienti pedagogico-magistrali cattolici. L'altro, «Il Balilla», è legato ad una stagione precisa, quella del Ventennio fascista. A questo riguardo è bene spendere due parole di inquadramento sulle riviste in oggetto. Con «Scuola Italiana Moderna» ci troviamo davanti al più longevo periodico magistrale italiano. La rivista nasce nel 1893 per iniziativa di Giuseppe Tovini (1841-1897), allora responsabile della Terza Sezione dell'Opera dei Congressi, assume maggior forza e slancio con la nascita della Società editrice La scuola di Brescia e, negli anni di attività della Riccini, si distingue per l'impegno profuso nel ribadire il ruolo della Chiesa e del cattolicesimo nell'edificazione della coscienza nazionale¹⁵. Anche «Il maestro» è una testata di orientamento cattolico che, come nel caso di «Scuola Italiana Moderna», è ancora attiva. Nasce come espressione della Sezione maestri dell'Azione cattolica italiana negli anni Trenta e, nel secondo dopoguerra, diviene organo dell'Associazione Italiana Maestri Cattolici, fondata nel 1945 da Maria Badaloni e Carlo Carretto, per

¹⁵ Sulle origini della rivista si veda la scheda di R. Sani in G. Chiosso (edd.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La scuola, 1992, pp. 388-390 e quella scritta da G. Chiosso, in Id. (ed.), *La stampa pedagogica e scolastica in Italia, 1820-1943*, Brescia, La scuola, 1997, pp. 622-628; e il contributo di R. Sani, *I periodici scolastici dell'intransigentismo cattolico (1879-1904)*, in G. Chiosso (ed.), *Stampa e scuola nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993, pp. 223-288.

combattere l'analfabetismo, affiancare la formazione degli insegnanti e sostenere il processo di ricostruzione del Paese per tramite dell'educazione¹⁶. «Il Balilla», invece, è legato alla stagione del regime fascista. Nasce come continuazione del «Giornale dei Balilla: periodico ufficiale dei Gruppi Balilla» nel 1924 ed esce come supplemento de «Il popolo d'Italia», quotidiano politico fondato da Benito Mussolini nel 1914 che, dopo il 1922, diviene organo del Partito Nazionale Fascista, rimanendo attivo fino al 1943¹⁷. Ci appare degno di nota il fatto che dei tre periodici citati, quest'ultimo è quello che risulta nel peggior stato di conservazione. I numeri rimasti sono mutili di diverse parti e spesso sono conservate solo le copertine. Possiamo ipotizzare che la Riccini se ne servì per l'attività didattica, senza usare quella cura e quel riguardo che in generale ha mostrato nella conservazione degli altri materiali presenti nella sua biblioteca. Forse la maestra anconetana era consapevole del fatto che la stagione fascista era destinata a finire? O forse operò una censura ex post delle cose non degne di far parte dei suoi ricordi di scuola?». Questo non lo possiamo dire con certezza, ma non ci sembrano del tutto infondate queste interpretazioni, che appaiono confermare la scarsa identificazione della Riccini con l'ideologia fascista.

Se passiamo all'analisi degli articoli del *fondo Riccini*, il quadro che emerge conferma in larga misura quanto detto riguardo ai periodici. Questa sezione del fondo consta di 200 articoli, di cui il 33,5% non è riconducibile ad una precisa testata e la restante parte, invece, rimanda a ben 25 pubblicazioni periodiche diverse. Da un punto di vista cronologico, va rilevato che solo il 33,5% degli articoli presenta una data precisa e abbraccia un periodo molto vasto, che va dal 1924 al 1973, anche se la maggior parte di essi interessa gli anni centrali dell'attività professionale della Riccini (dagli anni Venti agli anni Cinquanta). Rispetto alla varietà delle testate rappresentate va rilevato che quella che spicca tra tutte è «Scuola Italiana Moderna», che copre il 37,5% degli articoli, seguono «La domenica del corriere» e la «Voce adriatica» che interessano, rispettivamente, il 5,5% e il 4% degli articoli.

I dati più rilevanti di questa sezione del fondo emergono dall'esame dei titoli e degli autori. Circa il 34% degli articoli appare messo da parte per scopi chiaramente didattici, per servire alle lezioni di lingua italiana, storia, geografia, religione, igiene ed economia domestica. Lo si evince o dall'argomento trattato

¹⁶ Si veda la scheda di A. Gaudio, in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia*, cit., pp. 414-415.

¹⁷ A questo riguardo si può ricordare che, nella circolare n. 18 del 12 marzo 1932, il ministro Giuliano chiedeva che si operasse nella direzione della «più vasta propaganda per la diffusione» di questo giornale che si proponeva come «organo della Presidenza centrale dell'Opera Balilla», chiedendo di sottoscrivere almeno un abbonamento per ognuna delle bibliotechine delle singole classi. L'opera di propaganda del settimanale fu particolarmente incoraggiata anche dal ministro Ercole con ben tre circolari emanate nel 1934. Questo particolare supporto dato alla diffusione della rivista proprio sotto i ministeri Giuliano ed Ercole può spiegare la presenza nella biblioteca della Riccini di numeri relativi agli anni Trenta. V. Del Nero, *La scuola elementare nell'Italia fascista. Dalle Circolari Ministeriali 1922-1943*, Roma, Armando, 1988, pp. 119, 137.

nell'articolo o da sottolineature e commenti a margine della maestra, che nei casi più fortunati affianca il ritaglio di giornale con appunti personali di lavoro, come avviene con l'articolo *Il risparmio* di Mario Giusti in «La vita scolastica», che è stato conservato insieme a riassunti incentrati sul tema del risparmio scritti dalla stessa Riccini, per impostare lezioni dedicate a questo argomento. Diversi articoli tra quelli specificatamente legati all'attività d'insegnamento della Riccini, riguardano l'economia domestica; tra questi si distinguono quelli firmati da «La massaia scrupolosa», che scrive per la «Domenica del corriere» pagine dedicate alla cura e pulizia della casa (*La pulizia dei golfini, Per riporre i tappeti, Contro le cimici*) e dispensa utili consigli in ambito culinario (*La ricotta casalinga, L'aceto è genuino*). D'altra parte, come poteva essere altrimenti, visto che la Riccini insegnò soprattutto in scuole elementari femminili? Le buone abitudini e le consuetudini legittimate dalla tradizione e dalla saggezza popolare sembrano avere grande valore per la maestra, come testimoniano gli articoli della rubrica *La parola del medico* tenuta dal Dott. Amal per la «Domenica del corriere» (*Fuma lentamente; Contro il freddo; Bevande per gli assetati; Il fiordaliso; Latte, uova, minestrina per malati*) e probabilmente usati dalla maestra per le lezioni di igiene.

La maggior parte degli articoli tratti da «Scuola Italiana Moderna» concernono l'approfondimento teorico di natura pedagogica, le indicazioni pratiche per l'attività didattica e gli aggiornamenti sulla legislazione scolastica. Qui abbiamo firme importanti. Innanzitutto spiccano gli articoli dell'illustre pedagogista ex gentiliano poi convertito al cattolicesimo e al neotomismo Mario Casotti¹⁸, di cui la Riccini conserva due consistenti gruppi di articoli, uno riferibile agli anni 1927-1930 ed incentrato sulle varie declinazioni de *La didattica minore di Raffaello Lambrushini (L'insegnamento del leggere e dello scrivere, L'insegnamento della musica-l'insegnamento della storia, L'insegnamento delle scienze e dell'aritmetica, L'insegnamento professionale e l'educazione fisica)*; e, l'altro, pubblicato nel 1930, inerente il metodo Montessori, del quale viene offerta una lettura critica (*Luci ed ombre nel metodo Montessori, parte I e parte II; Gli "incastri", le figure geometriche e la didattica Montessoriana; La fantasia e la sensibilità del fanciullo e il "metodo Montessori"; Le due anime del metodo Montessori*). Interessante è la presenza di due articoli sul metodo Agazzi sempre a firma di Casotti (*Il metodo Agazzi e i "contrassegni". Note sull'educazione infantile e La fecondità del metodo Agazzi*), che mostrano la

¹⁸ Sull'opera e il pensiero di Mario Casotti si vedano: M. Rossi, *Mario Casotti e la sua opera*, «Pedagogia e Vita», n. 4, 1960-1961, pp. 492-519; A. Agazzi, *Interpretazione e significato della pedagogia di Mario Casotti*, «Pedagogia e Vita», n. 6, 1960-1961, pp. 484-491; E. Giammancheri, *La pedagogia idealistica e l'università cattolica*, «Pedagogia e Vita», n. 1, 1972-1972, pp. 31-59; F.V. Lombardi, *Mario Casotti. Dalla «Introduzione alla pedagogia» alla «Pedagogia generale»*, «Pedagogia e Vita», n. 4, 1985-1986, pp. 413-435; G. Chiosso, *Mario Casotti storico della pedagogia*, «Pedagogia e Vita», n. 2, 1992, pp. 67-89; C. Scurati, *Teoria della didattica e didattica operativa in Mario Casotti*, «Pedagogia e Vita», n. 1, 1993, pp. 59-77.

volontà della Riccini – poi confermata dall'analisi dei libri della sua biblioteca – di stare al passo con i tempi, di aggiornarsi e recepire le novità del dibattito pedagogico e didattico del suo tempo.

A questi articoli si va ad affiancare quello scritto da Maria Magnocavallo *Il metodo Montessori e Agazzinella critica di Lombardo-Radice*, che probabilmente aiutò la Riccini a fare sintesi e a precisare la sua posizione personale, di maestra cattolica vicina all'idealismo pedagogico, davanti a queste due proposte educative contemporanee. Del resto, ad offrirle le chiavi di lettura per interpretare il suo tempo era un personaggio di grande spessore. Maestra e direttrice delle scuole elementari milanesi dal 1890 al 1928, dirigente dell'associazione magistrale cattolica Niccolò Tommaseo e, non da ultimo, direttrice della sezione didattica di «Scuola Italiana Moderna», Maria Magnocavallo dovette rappresentare per la Riccini il modello di insegnante a cui guardare e al quale ispirarsi sia sul fronte dell'orientamento pedagogico da seguire che su quello più pregnante e urgente della vita scolastica¹⁹. A questo ambito, infatti, rimandano gli articoli della Magnocavallo conservati nel *fondo Riccini* (*Il maestro rurale; Il disegno nella scuola elementare; Come si può disciplinare una scolaresca; Una scuola dove si vive...e un superiore ...geniale; Il segreto della riuscita. Voti-premi-castighi; L'anima nella scuola; Prepariamoci con coscienza; Con maestre simili...; Il segreto per riuscire*), che risalgono agli anni Venti (1924-1930) e appiano soddisfare quel bisogno autentico di aggiornamento professionale, che attraversa tutti i materiali del *fondo Riccini* e che non si esaurisce nella semplice ricerca di strumenti operativi per la didattica applicata, ma appare animato dalla volontà di comprendere gli sfondi pedagogico-culturali attraverso i quali penetrare l'essenza stessa della scuola.

A questa istanza rispondono anche gli articoli firmati da Ottavia Bonafin, figura vicina alla Magnocavallo per formazione, orientamento culturale ed impegno professionale (sarà lei poi ad ereditare dalla Magnocavallo il ruolo di esperta di didattica in «Scuola Italiana Moderna»)²⁰. Gli articoli firmati dalla Bonafin trattano vari temi, approfondiscono pagine importanti della storia della pedagogia (*Enrico Pestalozzi, 1746-1827*), raccontano esperienze educative attuali da prendere ad esempio (*I 'Piccoli Fabre' di Portomaggiore*, manuale di pedagogia scritto da Lombardo-Radice per elogiare le nuove metodologie educative applicate delle sorelle Nigrisoli nella scuola dell'infanzia di Portomaggiore), offrono suggestioni sulle qualità morali che debbono connotare l'esperienza scolastica (*L'efficacia dello sforzo; Virtù che spariscono; Le virtù domestiche*) e mostrano attenzione verso quella legittima aspirazione all'avanzamento di carriera (*Guida per la preparazione agli esami per conseguimento del diploma di direttore didattico*), che «Scuola

¹⁹ Cfr. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo*, cit.

²⁰ R. Lollo, *Bonafin, Ottavia*, in Chiosso, Sani (edd.), *DBE*, cit., vol. 1, pp. 181-182.

Italiana Moderna» non manca puntualmente di promuovere ed incoraggiare. Ancora una volta siamo davanti a testimonianze che riflettono un desiderio di elevazione culturale della Riccini, che non si traduce nella semplice ricerca di un miglioramento della propria preparazione professionale e pedagogica, ma si declinano in una progressiva presa di coscienza di tutta la dignità e rilevanza dell'opera svolta quotidianamente nella scuola.

Va sottolineato, infine, che il *fondo Riccini* conservava ben cinquanta quaderni, di cui 13 contenenti ritagli di giornali, per lo più poesie ed esercizi, messi da parte per scopi didattici e la restante parte costituita da quaderni di appunti che, se si escludono i 5 quaderni relativi alla grammatica e alla lingua francese, probabilmente risalenti al periodo del corso di perfezionamento bolognese, riguardavano discipline scolastiche, per lo più la storia, la lingua italiana e la religione. Si tratta, pertanto, di materiali adottati in via preferenziale per scopi didattici. Purtroppo desumiamo questi dati solo dal primitivo inventario del *fondo Riccini* e siamo costretti a parlare al passato, perché un'avventata operazione di scarto inventariale ha portato al macero la maggior parte di questi documenti. Sono sopravvissuti solo tre quaderni con ritagli di poesie, per la maggior parte tratte da «Scuola Italiana Moderna», e un quaderno con appunti per l'insegnamento della storia, chiaramente compilato durante il Ventennio fascista, che propone sintesi utili a svolgere il programma di studio previsto per la quinta classe²¹. Questi elementi, nonostante tutto, ci aiutano a chiarire alcuni aspetti inerenti la metodologia didattica adottata dalla Riccini. Possiamo legittimamente avanzare l'ipotesi che la maestra nello svolgimento delle lezioni non solo si avvale di rielaborazioni personali di alcuni contenuti di studio, ma che fece anche ampio uso di pubblicazioni periodiche. Del resto è stato già dimostrato come «le riviste magistrali fecero parte dei ferri dei mestieri di quasi tutti gli insegnanti»²² e come nell'ambito delle pubblicazioni utilizzate dai maestri la facessero da padrona due riviste: «I Diritti della Scuola» e «Scuola Italiana Moderna». Tra le due il periodico scolastico bresciano godette di una particolare predilezione soprattutto tra le maestre, in quanto si conciliava con la «più marcata adesione delle [... stesse] alle posizioni del cattolicesimo»²³. La

²¹ Maria Riccini, *Noticine della maestra*, CESCO, RCC, V. 116.

²² M. Dei, *Colletto bianco, grembiule nero. Gli insegnanti elementari italiani tra l'inizio del secolo e il secondo dopoguerra*, Bologna, il Mulino, 1994, pp. 155-167. L'opera, com'è noto, si basa sulla rielaborazione di 1.563 questionari somministrati ad ex insegnanti che nell'autunno del 1980 avevano almeno settant'anni d'età. Dall'indagine compiuta emerge che l'88% delle maestre e il 95% dei maestri interessati dal questionario si servirono sistematicamente delle riviste magistrali per preparare le proprie lezioni. Sul ruolo svolto dalle riviste nell'aggiornamento professionale degli insegnanti si vedano anche E. De Fort, *I maestri elementari italiani dai primi del Novecento alla caduta dal fascismo*, «Nuova rivista storica», nn. V-VI, 1984, pp. 527-576; Ead, *La cultura dei maestri*, in *Cultura e società negli anni del fascismo*, Milano, Cordani editore, 1987, pp. 221-260; G. Chiosso, *Giornali e giornalisti per la scuola nel secondo Ottocento*, in Id. (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992, pp. 7-44.

²³ Dei, *Colletto bianco, grembiule nero*, cit., p. 162.

maestra Riccini – come si è dimostrato – fu molto legata a questa rivista non solo per la possibilità di aggiornamento sui più recenti sviluppi del dibattito pedagogico che le offriva, ma anche per la ricca sezione *Didattica* presente nel periodico, nella quale poteva trovare indicazioni operative da seguire nel concreto svolgimento del mestiere.

3. *La biblioteca di formazione: alcune chiavi di lettura*

Sotto la categoria libri sono racchiusi testi che vanno dalla fine dell'Ottocento agli ultimi anni di vita della maestra Riccini. Ora, se consideriamo gli anni di edizione delle opere, fatto presente che circa il 20% di queste è privo di datazione, possiamo affermare che un nucleo significativo di opere, circa il 24%, appartiene agli anni della formazione magistrale e delle prime esperienze di insegnamento; mentre la parte più rilevante della biblioteca presenta opere pubblicate durante il Ventennio, le quali costituiscono il 31% del patrimonio librario. Questo dato non sorprende, visto che in questi anni si colloca il periodo centrale dell'attività lavorativa della maestra Riccini. Ci preme rilevare, però, che il 19% del patrimonio librario della Riccini si colloca negli anni compresi tra il secondo dopoguerra e il pensionamento della maestra, mentre solo il 6% della sua biblioteca appartiene agli ultimi anni della sua vita. Questo dato conferma l'impressione di una biblioteca di lavoro, che la Riccini ebbe modo di arricchire soprattutto negli anni in cui fu attiva come insegnante.

Molti testi, verosimilmente quelli più antichi, appartengono al periodo giovanile ed accompagnano gli anni di studio presso la scuola normale e quelli del corso di perfezionamento bolognese. A questa fase risalgono i libri riservati allo studio della lingua italiana, come i *Precetti di stilistica italiana seguiti da un breve sommario di storia letteraria italiana ad uso delle scuole secondarie* editi da Albrighi e Segati (2. ed. riveduta, corretta ed arricchita di tavole sinottiche del 1902), la *Grammatica italiana: fonologia e morfologia* di Ettore Piazza (Livorno, Raffaello Giusti editore, 1905) e le *Regole ed esercizi di grammatica italiana, ad uso delle scuole medie inferiori* di Giuseppe Finzi (Torino, Lattes, 1917). Così come alla stagione giovanile risale un buon numero di volumi per lo studio della letteratura italiana, come le *Prose e poesie scelte e annotate per le scuole secondarie di grado inferiore* curate da Enrico Mestica e Venerio Orlandi e i manuali di Alessandro d'Ancona e Orazio Bacci (5 volumi editi tra il 1904 e il 1906 per i tipi dell'editore Barbera di Firenze), ai quali possono essere accostati gli *Elementi di letteratura secondo il programma per le scuole normali e magistrali d'Italia* di Felice Battioni (Biella, Tipografia, litografia, libreria G. Amosso, 1870), il *Manuale della letteratura italiana* (Firenze, Barbera, 1882) di Francesco Ambrosoli e gli *Ammaestramenti di letteratura* di Italo Pizzi (Torino, Loescher, 1885). Tale ipotesi è attestata dall'analisi dei titoli.

Per l'insegnamento della storia e della geografia abbiamo testi molto essenziali, espressione dell'editoria locale, come le *Nozioni di storia e geografia secondo gli ultimi programmi governativi, approvati con R. decreto 29 gennaio 1905 per le terze classi elementari della regione marchegiana* di Matilde Cirilli (Ancona, Carlo Mengarelli, 1910), ma anche opere largamente adottate come *il Manuale di storia patria: ad uso delle scuole ginnasiali inferiori* di Gaetano Capasso (Torino, Paravia, 1910) e *La storia d'Italia: per le scuole complementari* (Torino, Giovanni Gallizio, 1905) curata dagli storici Giovanni Bragagnolo e Enrico Bettazzi. Da segnalare anche i manuali di storia ad uso delle scuole normali curati da due autrici, Emilia Rebecchini Vanni e da Teresa Tortona (Torino, Paravia, 1907), presenze alquanto rare nel mondo della manualistica disciplinare del primo Novecento²⁴.

Per la geografia si distinguono gli *Elementi di geografia generale* del rinomato professore universitario di geografia Carlo Errera (Bologna, Zanichelli, 1923) e due opere in due volumi pubblicate nel primo decennio del Novecento dall'Istituto Italiano d'arti grafiche di Bergamo, ovvero l'*Atlante scolastico per la geografia moderna* redatto da Giuseppe Roggero e Giuseppe Ricchieri e il fortunato *Atlantico storico* di inizi Novecento di Arcangelo Ghisleri. Non mancano nomi illustri della manualistica di settore, come quello del noto geografo e ingegnere trapanese Domenico Giannitrapani, presente con *il Manuale-Atlante di geografia ad uso delle scuole medie inferiori* (Firenze, Bemporad, 1921), e del figlio Luigi, rappresentato nella biblioteca della Riccini con l'opera *I paesi redenti descritti ai ragazzi d'Italia* (Firenze, Bemporad, 1919)²⁵.

Per quanto riguarda le discipline di ambito scientifico, nella biblioteca di formazione della Riccini troviamo testi di ampia fortuna come *Le meraviglie del corpo umano* di Ildebrando Bencivenni (Firenze, Salani, 1904) e diversi manuali legati all'insegnamento di scienze naturali ed igiene, come quelli scritti dal professore di biologia livornese Giotto Bizzarrini *Nozioni di igiene con l'aggiunta dei primi soccorsi in caso di infortunio e d'improvviso malore* e *Nozioni di storia naturale esposte in quadri sinottici* pubblicati entrambi dall'editore Raffaello Giusti di Livorno, presenti nelle edizioni, rispettivamente, del 1905 e del 1909; come le *Nozioni di scienze fisiche e naturali ad uso delle scuole normali* del paleontologo Senofonte Squinabol, manuale stampato sempre da Raffaello Giusti e presente con l'edizione del 1903; come *La botanica ricreativa: le meraviglie della vegetazione esposte alla gioventù* dell'agronomo e architetto del paesaggio Giuseppe Roda (Torino, Paravia, 1907), e come

²⁴ Cfr. A. Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, EUM, 2009, pp. 19-38, 219-308.

²⁵ Cfr. S. Oliviero, *Domenico e Luigi Giannitrapani geografi per la scuola*, in G. Bandini (ed.), *Manuali, sussidi e didattica della geografia. Una prospettiva storica*, Firenze, Firenze University Press, 2012, pp. 95-102.

il corposo manuale *l'Igiene popolare moderna* di Anacleto Ghione (Torino, Libreria salesiana editrice, 1901).

Significativa anche la presenza di testi pensati per supportare l'insegnamento del disegno, tra i quali incontriamo opere di natura discorsiva, utili a cogliere il significato stesso del concetto di arte, come i *Pensieri sull'arte e ricordi autobiografici* dello scultore senese Giovanni Duprè (Firenze, Le Monnier, 1906), e volumi pensati appositamente per gli studenti della scuola normale e per i futuri maestri, come *L'arte nella scuola: studio pedagogico-didattico per le scuole normali e pei giovani insegnanti* di Andrea Bertoli (Bemporad, 1920). Questi elementi teorici saranno affiancati negli anni di insegnamento da concreti sussidi didattici, in parte tratti da riviste e supplementi di riviste e in parte realizzati dalla stessa maestra, come testimoniano le ricche e interessanti collezioni di immagini e di schemi di disegni conservati nel *fondo Riccini*.

Naturalmente è nella scuola normale che la maestra marchigiana viene a contatto con una delle discipline caratterizzanti del suo corso di studio: la pedagogia. Inizialmente approccia la materia attraverso testi di sintesi come gli *Elementi di pedagogia e brevi cenni storici sui principali sistemi di educazione* (Torino, Paravia, 1905) di Paolo Vecchia e l'opera in tre volumi *Linee di pedagogia elementare, per le scuole normali e i maestri secondo i vigenti programmi governativi* di Saverio de Dominicis (Roma, Società editrice Dante Alighieri di Albrighi, Segati e c., 1908), e attraverso opere di inquadramento storico-pedagogico come la *Storia generale dell'educazione. Per istudio dei giovani delle scuole normali e per gli aspiranti all'ispettorato scolastico* (Torino, Paravia, 1887) di Andrea Gelmini e la *Storia della pedagogia* di Gabriele Compayré (Torino, Paravia, 1908); ma è soprattutto nel periodo di studio bolognese che la Riccini ha modo di irrobustire la sua preparazione pedagogica.

Va rilevato, peraltro, che in questa fase si accosta anche allo studio della filosofia attraverso la guida di due sapienti insegnanti: Giuseppe Tarozzi, di cui legge *Filosofia morale e nozioni affini ad uso dei maestri e del corso di perfezionamento per i licenziati delle scuole normali* (Bologna, Zanichelli, 1921), e Angelo Valdarnini, di cui studia *Il metodo sperimentale da Aristotele a Galileo* (Bologna, Zanichelli, 1920) e gli *Elementi scientifici di psicologia e logica* (Torino, Paravia 1920); testo, quest'ultimo, che le consente una prima introduzione a discipline come la psicologia e la logica all'epoca considerate articolazioni del sapere filosofico. L'avvicinamento alla filosofia, disciplina assente nel piano di studi della scuola normale, risponde a quel bisogno di innalzamento della formazione iniziale degli insegnanti che veniva recepito proprio in quegli anni dalla Riforma Gentile, con la quale prendeva vita l'Istituto magistrale in sostituzione della vecchia scuola normale²⁶.

²⁶ Sulla Riforma Gentile si vedano: J. Charnitzky, *Fascismo e scuola. La politica scolastica del Regime (1922-1943)*, Firenze, La Nuova Italia, 1996, in partic. pp. 93-191; E. De Fort, *La scuola elementare dall'unità alla caduta del fascismo*, Bologna, il Mulino, 1996, pp. 357-387; M. Ostenc,

Per quanto riguarda l'approfondimento delle conoscenze pedagogiche, la Riccini si può giovare di un altro importante studioso, anch'egli docente presso il corso di perfezionamento di Bologna. Si tratta di Giuseppe Michele Ferrari, una figura che segna profondamente il percorso di formazione e di vita della maestra marchigiana²⁷. Di tendenza kantiana in filosofia ed herbartiana in pedagogia, il Ferrari si avvicinò gradualmente allo spiritualismo, che risultava in linea con il suo orientamento profondamente religioso e attento alle problematiche sociali. La sua opera più nota, *La Pedagogia come scienza e la sua legge suprema*, edita a Bologna nel 1912, fu una delle fonti utilizzate dalla Riccini nel redigere l'elaborato finale del corso di perfezionamento, che reca un titolo molto significativo, *La funzione educativa nella sua importanza, nella sua efficacia e nei suoi apostoli*, dal quale si evince la totale dedizione e l'autentica vocazione con la quale la maestra si dedicò all'insegnamento²⁸. Nel periodo bolognese la Riccini, grazie al Ferrari, studia la pedagogia sulle opere di personaggi che sarebbero diventati di lì a breve protagonisti dello scenario educativo italiano, l'uno come ministro della Pubblica Istruzione e l'altro come Direttore generale dell'Istruzione elementare. Si fa riferimento, ovviamente, a Giovanni Gentile, di cui la giovane maestra legge il *Sommario di pedagogia generale come scienza filosofica* (Bari, Laterza, 1920) e a Giuseppe Lombardo Radice, di cui legge le *Lezioni di pedagogia generale* (Palermo, Sandron, 1922) e segue attentamente la produzione letteraria negli anni, come mostra la presenza nella sua biblioteca di altre opere del pedagogista catanese (*Athena fanciulla. Scienza e poesia della scuola serena*, Firenze, Bemporad, 1926; *I piccoli Fabre di Portomaggiore*, Roma, Associazione per il Mezzogiorno, 1926; i primi tre supplementi della rivista diretta da Lombardo Radice, «L'educatore nazionale», usciti nel 1928, vale a dire *Vestigia di anime, Il maestro esploratore e Una visita di Angelo Patri*).

In questi anni la Riccini si accosta anche agli scritti di un altro eminente pedagogista italiano del tempo, che si distingue per la sua linea di pensiero indipendente dall'idealismo gentiliano. Intendiamo riferirci a Giovanni Calò, di cui la maestra studia uno dei testi più noti: *L'educazione degli educatori* (Brescia, La scuola, 1923)²⁹. È interessante rilevare che nella sezione pedagogica della biblioteca dell'insegnante marchigiana sono accolti anche testi di due esponenti femminili di primo piano del cosiddetto attivismo pedagogico e

La scuola italiana durante il fascismo, Roma-Bari, Laterza, 1981, pp. 27-42.

²⁷ M. D'Ascenzo, Ferrari, *Giuseppe Michele*, in Chiosso, Sani (edd.), *DBE*, cit., vol. 1, pp. 539-540.

²⁸ Cfr. Perini, *Maria Riccini*, cit., pp. 57-59.

²⁹ Su Giovanni Calò si rinvia a: F. Battaglia, *Il pensiero e l'opera di Giovanni Calò*, Lecce, Tip. di Matino, 1956; Id., *Giovanni Calò e l'opera sua*, Firenze, Editrice universitaria, 1959; E. Petrini, *Giovanni Calò: dal realismo spiritualista all'umanesimo cristiano*, Firenze, Le Monnier, 1971; G. Elia, C. Laneve, *Pedagogia e scuola in Giovanni Calò*, Fasano, Schena, 1987; E. Petrini, *La pedagogia di Giovanni Calò*, «Pedagogia e vita», n. 5, 1996, pp. 75-93.

delle cosiddette scuole nuove, conosciute anch'esse negli anni di formazione, ovvero Maria Montessori, rappresentata dalla monografia *Il metodo della pedagogia scientifica applicato all'educazione infantile nelle case dei bambini* (Maglioni e Stiri, 1918), e Rosa Agazzi, di cui la Riccini possedeva ben tre testi: *Lezioni varie di lavoro educativo: per le scuole elementari e normali* (Milano, Vallardi, 1904), *Come intendo il museo didattico nell'educazione dell'infanzia e della fanciullezza* (Brescia, Tipografia vescovile querinaria, 1923) e *L'arte delle piccole mani* (Brescia, La scuola, 1927). Va sottolineato, infine, che la passione per la saggistica pedagogica accompagnerà la Riccini anche negli anni della maturità e della pensione, come è testimoniato dalla presenza nella sua biblioteca di opere quali *L'insegnamento individualizzato* del pedagogista svizzero Robert Dottrens (Roma, Armando, 1957) e la *Pedagogia: termini e problemi. Dizionario ragionato* a cura di Cesare Scurati e Franco Lombardi (Milano, Le stelle, 1972).

Molti testi della biblioteca della Riccini, per l'esattezza 39 titoli, riguardano la lingua e la letteratura francese. Si può ricordare a questo riguardo che la maestra, durante il corso di perfezionamento bolognese, conseguì anche il diploma di abilitazione all'insegnamento del francese; un titolo, questo, molto richiesto all'epoca per accedere all'insegnamento della lingua francese presso le scuole medie, che tuttavia la Riccini non sfrutterà mai³⁰. Tra i testi per lo studio del francese troviamo ben 12 grammatiche e 10 antologie, tra cui spiccano le opere di Giovanni Bonfiglio (*Corso completo di lingua francese; Premières lectures françaises* e le *Lectures francesi scelte ed annotate per uso delle scuole secondarie d'Italia*). Non mancano eserciziari, testi di narrativa in lingua e anche opere di carattere devozionale, che rappresentano – come si spiegherà meglio a breve – una delle costanti della biblioteca della Riccini. Molti testi, inoltre, circa 1/3 del piccolo *corpus* di titoli legati al mondo francese sono editi dopo il 1958, a riprova del fatto che la passione per la cultura francese fu coltivata dalla Riccini anche dopo il pensionamento.

Una sezione interessante della biblioteca della Riccini è costituita dai classici della letteratura antica e italiana e della letteratura pedagogica. Si tratta di pochi titoli, per lo più appartenenti al periodo giovanile, rappresentativi del buon livello culturale della maestra e della sua volontà di coltivare spazi per la formazione personale. Sul versante dei classici del pensiero pedagogico, abbiamo testi come i *Pensieri sull'educazione* di Locke (Milano, Trevisini, 1918), *La pedagogia* di Kant (Torino, Paravia, 1921), *Come Gertrude istruisce i suoi figli* di Pestalozzi (Milano, Trevisini, 1927), i *Discorsi e contratto sociale* di Rousseau (Bologna, Cappelli, 1932). Per quanto riguarda i classici della letteratura greca e latina, la biblioteca accoglie un'edizione delle opere omeriche (Milano, Bietti, 1907) e due adattamenti per la scuola dell'*Eneide* di Virgilio: *Il padre Enea: dall'Eneide di P. Virgilio Marone*, appartenente alla collana *I grandi poemi*

³⁰ Cfr. Perini, *Maria Riccini*, cit., p. 44.

dell'umanità raccontati ai fanciulli e al popolo da Gherardo Ugolini (La scuola, 1926) e *L'Eneide: libri scelti commentati ed esposizione sommaria dell'opera, ad uso delle scuole medie in conformità dei vigenti programmi* di Arturo Pompeati e Luigi Sasso (Brescia, Vannini, 1927). Sul fronte della letteratura italiana abbiamo alcune opere rappresentative come la *Divina commedia* di Dante (Firenze, Sansoni, 1907), un'edizione mutila delle *Novelle* del Boccaccio e un'altra ugualmente in pessime condizioni della *Gerusalemme liberata* del Tasso, l'*Orlando furioso* dell'Ariosto (Firenze, Barbera, 1905), due edizioni dei *Promessi sposi* del Manzoni (Milano, Sonzogno, 1940 e Torino, SEI, 1943), quattro edizioni di commedie scelte del Goldoni e un'edizione annotata per le scuole della tragedia *Saul* di Alfieri (Verona, Tedeschi, 1890).

Sempre durante gli anni della scuola normale e del perfezionamento a Bologna, la Riccini si accosta alla letteratura per l'infanzia. Tra i primi testi che entrano nella sua biblioteca troviamo un esempio della letteratura selfhelpista ottocentesca: *Il carattere* di Samuel Smiles (Firenze, Barbera, 1875). Ovviamente ci sono altri testi rappresentativi della letteratura per l'infanzia straniera, come *La capanna dello zio Tom* (Salani, 1903), *Il richiamo della foresta* di Jack London (Milano, Madella, 1933), un riadattamento per fanciulli del *Robinson Crusé* di Defoe (Firenze, Sani, 1932) e le immancabili favole dei fratelli Grimm, presenti con due raccolte, una del 1933 e una del 1946. Sul fronte della letteratura per l'infanzia italiana la fanno da padroni due autori: Carlo Lorenzini, alias Collodi, presente con *Minuzzolo*, (1921), *Le avventure di Pinocchio* (1934) e due edizioni del *Giannettino* (una senza data e una del 1922); ed Edmondo de Amicis, presente con *Gli amici* (Treves, 1889), *La carrozza di tutti* (Treves, 1907), *Il supplizio del geloso* (Treves, 1908), *Un colpo di fulmine* (Treves, 1908), e due edizioni di *Cuore* (Treves, 1931, Garzanti, 1969). Significativa la presenza della scrittrice fiorentina Ida Baccini con *Tonono in calzon lunghi: con altri racconti per ragazzi* (Salani, 1913). Il nucleo dei titoli riconducibile alla letteratura per l'infanzia non è molto nutrito, ma appare guidato da scelte perfettamente in linea con i gusti del tempo. Questi dati sicuramente confermano una contenuta attenzione verso la letteratura per l'infanzia e ci appaiono conformi con il taglio dell'insegnante elementare del tempo, che si limitava a veicolare la conoscenza della letteratura per l'infanzia prevalentemente attraverso l'uso delle pagine antologiche presenti nei libri scolastici.

4. La biblioteca di lavoro tra strumenti professionali e libri di scuola

Se fino ad ora si è parlato prevalentemente dei testi di formazione della Riccini, riferendoci soprattutto ai primi volumi che entrano a far parte della sua biblioteca personale, è giunto il momento di concentrarci sulla vera e propria

biblioteca di lavoro della maestra anconetana, che accompagna i lunghi anni di insegnamento di questa infaticabile ‘vestale della scuola’.

Una voce importante, in questa direzione, è costituita da quelli che potremmo definire gli strumenti del mestiere. Facciamo riferimento ai classici dizionari di lingua italiana, come quello redatto da Enrico Mestica (Editrice libraria italiana, 1943), e ai vocabolari pensati appositamente per i più piccini, come l'*Indovina, Grillo! Allegro vocabolario nomenclatore per i fanciulli* di Arpalice Cuman Pertile (Firenze, Bemporad, 1923). Facciamo riferimento altresì alle opere di carattere enciclopedico, come il *Dizionario generale di cultura* (Torino, SEI, 1958), l'*Enciclopedia popolare illustrata* (Roma, Edoardo Perino, 1887-1904) e l'*Enciclopedia del cattolico* (Milano, Bianchi-Giovini, 1948). Ma entro questa categoria si possono includere anche le raccolte di normativa scolastica come i *Provvedimenti per la istruzione elementare e popolare* (Milano, Società Editrice Libreria, 1911), così come le diverse guide ai programmi per la scuola elementare, che la Riccini via via colleziona per adempiere alle indicazioni ministeriali (*I nuovi programmi per le scuole elementari*, Napoli, E. Pietrocola, 1930; Giuseppe Giovanazzi, *La scuola del balilla. Commento ai nuovi programmi per le scuole elementari*, Torino, Paravia, 1935; Carmela Cottone, *Nuovi programmi della scuola primaria*, Firenze, Edizioni Giuntine, 1956). Diverse sono anche le guide per la preparazione agli esami di scuola elementare come ad esempio *Gli esami nelle scuole elementari. Manuale analitico-alfabetico con commenti ed annotazioni* del maestro ed ispettore scolastico Raffaele Mariani (Ascoli Piceno, Cesari, 1914), così come non mancano i prontuari per l'insegnamento, da cui trarre spunto per l'attività didattica quotidiana (Ermelinda Balbis Garrone, *Cento lezioni pratiche: per il corso popolare*, Torino, Libreria Editrice Internazionale, 1918) e per le esercitazioni di classe (come le pubblicazioni di Secondo Mollo editate dalla Libreria Editrice Internazionale di Torino nel 1916: *La dettatura: esercizi graduati sopra le principali difficoltà per la terza e quarta classe elementare* e i *Molti esercizi e poche regole grammaticali: per la terza classe elementare*). Sono presenti, infine, anche opere di affiancamento dell'attività didattica di carattere più discorsivo e colloquiale come il testo del già ricordato Raffaele Mariani *Ad una esordiente: consigli e suggerimenti di un vecchio maestro* (Ascoli Piceno, Cesari, 1923).

Se è vero che le tipologie di testi finora elencate rappresentano una sezione importante della biblioteca di lavoro della Riccini, è altrettanto vero che la parte più significativa ai fini del nostro discorso è costituita da manuali scolastici e libri di lettura. In questo ambito, lo spartiacque storico è dato dall'entrata in scena del libro unico di Stato, avvenuta con la legge del 7 gennaio del 1929, che modificò radicalmente il mercato librario italiano, imponendo l'adozione per le scuole elementari dei libri di scuola approvati dal regime³¹. Qui sorprende

³¹ Cfr. 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,

constatare come la maestra abbia conservato pochi esemplari di libri di Stato. Abbiamo il libro di lettura per la seconda classe di Ornella (alias Oronzina Quercia Tanzarella) e quello per la quarta classe di Angelo Silvio Novaro, il cui avvento fu anticipato da pubblicazioni come *Il fascio: nuovissimo sussidiario completo Bemporad* del 1928, e poche altre letture chiaramente riconducibili alla scuola fascista, come: *La vita di Arnaldo*, fratello del duce, scritta dallo stesso Mussolini (Milano, Popolo d'Italia, 1932); il racconto per ragazzi *Balilla* della traduttrice e scrittrice per l'infanzia Albertina Palau e *Il giro dell'anno* di un autore prolifico di libri per la scuola e per l'infanzia nonché convinto sostenitore del fascismo: Giuseppe Fanciulli. Il fatto che l'avvento del 'libro fascista' sia scarsamente registrato nella biblioteca della Riccini, può essere ricondotto ad una scelta deliberata dalla maestra anconetana, che probabilmente decise di operare una selezione precisa nelle scelte conservative della sua biblioteca.

Un elemento significativo che ci permette di avanzare questa ipotesi, consiste nel fatto che la maggior parte dei libri di scuola custoditi nella biblioteca della Riccini risalgono agli anni Venti. Si tratta di testi che hanno per protagonisti bambini veri, che non sono più la copia esatta degli adulti, come era nei libri di testo ottocenteschi, e che si presentano come soggetti dotati di una straordinaria carica vitale, di cui viene apprezzata la spontaneità e tutti i comportamenti tipici dell'età infantile, anche quando si manifestano nella forma delle piccole marachelle e birichinate. Sono testi che appaiono come il derivato più fruttuoso dell'affermazione di quell'idealismo pedagogico lombardo-radiciano al quale Maria Riccini sembra aver aderito convintamente. Facciamo riferimento a libri di lettura come *Albe radiose* di Angelo Zaccaria (Torino, Paravia, 1924), *La spiga* di Vera Gaiba e Francesco Lanza (Torino, Paravia, 1925) o al noto *Cieli sereni* di Bianca Lena Pistamiglio (Milano, Mondadori, 1925), e a libri di lettura destinati alle scuole rurali come *Il granello di senape* di Giulia Varisco (Brescia, La scuola, 1924) e *La giovine aurora* di Giovanni Capodivacca (Firenze, Bemporad, 1924). Tutti testi accomunati dall'adesione «alla realtà psicologica del lettore»³².

Un buon numero dei libri di scuola sono dedicati all'insegnamento dell'educazione fisica, del canto e della religione. In merito a quest'ultima categoria vale la pena di spendere qualche parola in più. Indubbiamente siamo davanti alla tipologia di manuali scolastici più rappresentata nella biblioteca della Riccini. D'altra parte non poteva essere altrimenti vista la robusta fede cattolica che sostenne la maestra nell'arco di tutta la sua esistenza e vista anche la sua passione spiccata per le letture amene di argomento religioso, che spaziano dalle agiografie, tra le quali si distinguono le numerose opere dedicate

Alfabetica, 2009, in partic. pp. 17-31.

³² M. Bacigalupi, P. Fossati, *Da plebe a popolo: l'educazione popolare nei libri di scuola dall'unità d'Italia alla repubblica*, rist. anast., Milano, Pubblicazioni dell'I.S.U. Università cattolica, 2000, p. 168.

alla vita di san Giovanni Bosco, ben sei; alle storie sulla vita di Gesù, come la *Vita di Gesù* di Piero Chiminelli (Firenze, Salini, 1939); dai classici della letteratura spirituale, quali il *Combattimento spirituale* di Lorenzo Scupoli (Torino, Marietti, 1909), alle opere che testimoniano la fede rosminiana della Riccini (*Della divina provvidenza*, Domodossola, SALE Sodalitas, 1934; *Scritti pedagogici*, edizione del 1940 con introduzione e note di Mario Casotti; *Le cinque piaghe della Chiesa*, Milano, Bompiani, 1943; e *Il rosminianismo* di Giovanni Maria Cornoldi del 1881), passando perfino agli scritti di edificazione personale, alcuni dei quali – come abbiamo visto – sono in lingua francese. Per quanto riguarda i manuali di scuola utili all'insegnamento della religione abbiamo le classiche pubblicazioni curate dall'editrice La scuola di Brescia, come le *Lezioni di catechismo illustrate per le scuole elementari* del 1923, le *Prime lezioni di catechismo* del 1924 e *La morale cristiana per la classe quarta* del 1923, le opere in due volumi edite dall'Unione cattolica giovanile di Viterbo scritte da Alceste Grandori per la collana *Per la cultura religiosa dei bambini*, vale a dire *La storia sacra* e *La storia della Chiesa*, e manuali destinati all'insegnante, come la *Guida all'insegnante comprendente quattro parti. Dogma, Morale, Grazia, Storia*, curata dall'Istituto delle Canossiane di Pavia.

Tra i manuali scolastici e i libri di lettura legati alla pratica didattica, dai quali evidentemente la maestra trasse idee e suggestioni per impostare le sue lezioni, troviamo diversi testi teatrali riadattati o appositamente pensati per i più piccoli, come ad esempio *I confetti della nonna. Scenette per bambine con accompagnamento di pianoforte* di Michele Mondo (Torino, Leandro Chenna, 1924), *Recitiamo: dialoghi e scenette per gli alunni delle scuole elementari* di Anna Bertoli (Torino, SEI, 1924) e i *Componimenti teatrali per fanciulli* del prolifico Raffaele Mariani (Lanciano, Stab. Tip. Edit. Fratelli Mancini, 1924). Forse questa è la testimonianza più significativa della volontà della Riccini di tradurre in pratica quell'idea di scuola nuova, viva e attiva, teorizzata da Lombardo-Radice, alla quale questa instancabile ed umile insegnante cercò di tener fede nell'esercizio della sua professione.

Per quanto riguarda i testi ad uso scolastico del secondo dopoguerra, la biblioteca della Riccini ne conserva pochissimi esemplari e qui non sorprende trovare autori di lungo corso attivi anche nella stagione precedente, come Giuseppe Fanciulli, di cui abbiamo il testo *Lisa-betta* nell'edizione del 1947, e Pietro Bargellini, presente con *Il fiore, 3^a classe* (Firenze, Vallardi, 1951). Maria Riccini vive da insegnante solo il primo decennio del secondo dopoguerra. Una fase delicatissima che se, da una parte, vede l'avvento della democrazia repubblicana, dall'altra, conosce – a livello scolastico e non solo – tutta la fatica del voltar pagina e del dar vita ad una nuova fase fondata su una profonda consapevolezza di ciò che è stato e di ciò che ci si deve preparare ad essere. La scuola elementare, nonostante sia oggetto di una specifica attenzione, testimoniata dall'emanazione prima dei programmi Washburne del 1945

e poi di quelli Ermini del 1955, fa fatica a lasciarsi alle spalle la precedente stagione e anche la manualistica scolastica spesso ricorre ai vecchi autori e libri, blandamente epurati dalle pagine più compromesse con il fascismo. Per avere manuali di nuova generazione, com'è noto, si dovranno attendere gli anni Cinquanta, ma quelli che appariranno non saranno autentici veicoli di costruzione del nuovo cittadino partecipe del governo democratico, quanto testi neutri, condannati a riproporre stancamente cliché ottocenteschi³³.

La differenza in questo contesto è data dai singoli e, in particolare, da tutti quegli insegnanti che, come la Riccini, si impegnano a introdurre esperienze di educazione alla cittadinanza all'interno delle aule scolastiche, testimoniando con il loro silenzioso esempio il ruolo determinante esercitato dalla classe magistrale nel traghettare le giovani generazioni verso il nuovo, pur consapevoli dell'ardua sfida data dalla necessità di colmare le lacune del sistema-Paese. La maestra marchigiana – infatti – studia, si documenta, si prepara alla nuova stagione, come testimonia la presenza nella sua biblioteca delle guide ai nuovi programmi, e promuove nelle sue classi diverse esperienze di partecipazione democratica, come il referendum per l'elezione della responsabile della biblioteca scolastica³⁴, e di educazione alla solidarietà e alla convivenza civile, come l'adesione alle campagne di lotta contro la tubercolosi promosse dalla Croce rossa³⁵.

³³ Cfr. Ascenzi, *Metamorfosi della cittadinanza*, cit., pp. 309-333; D. Montino, *Le parole educate. Libri e quaderni tra fascismo e Repubblica*, Milano, Selene edizioni, 2007, in partic. pp. 187-216.

³⁴ Maria Riccini, *Registro di classe*, a.s. 1947-48, sez. *Cronaca di vita della scuola, osservazioni sugli alunni*, Archivio storico dell'Istituto Comprensivo «A. Novelli» di Ancona, Fondo Scuola elementare «Mazzini». Le copie dei giornali e dei registri di classe redatti dalla maestra Riccini tra l'a.s. 1931-32 e l'a.s. 1957-58 sono state versate nel *fondo Riccini* nel 2009. Per i giornali della classe che vanno dall'a.s. 1936-1937 all'a.s. 1940-1941 abbiamo solo le copertine. Per gli anni scolastici 1941-42, 1942-43, 1944-45 abbiamo solo la relazione finale. Manca il giornale della classe dell'a.s. 1945-46. Per l'ultimo decennio di attività della Riccini, invece, sono disponibili tutti i registri di classe. Va precisato che il Giornale della classe fu introdotto con la circolare n. 91 del 1° ottobre 1927 e rappresentò il nuovo modello di registro che doveva accompagnare tutte le scuole elementari italiane. Era costituito da diverse sezioni: *Nozioni statistiche*, *Elenco degli alunni di classe*, *Programma didattico per gruppi di lezioni da svolgersi nell'anno*, *Svolgimento del programma*, *Registro delle qualifiche degli alunni*, *Cronaca ed osservazione dell'insegnante sulla vita della scuola*, *Registro degli scrutini o degli esami*, *Processo verbale dell'esame*, *Relazione finale dell'insegnante*. Cfr. Del Nero, *La scuola elementare nell'Italia fascista*, cit., p. 70.

³⁵ Maria Riccini, *Registro di classe*, a.s. 1946-47, sez. *Cronache di vita della scuola, osservazioni sugli alunni*; Ead., *Registro di classe*, a.s. 1951-52, sez. *Cronache di vita della scuola, osservazioni sugli alunni*.

5. *Primi sondaggi di vita scolastica: la parola agli alunni*

All'interno del *fondo Riccini*, come si è accennato, si conserva una nutrita congerie di materiali non a stampa, che rappresenta una delle sezioni più rilevanti dell'archivio didattico della maestra anconetana. Questa messe di documenti è costituita, in parte, da materiali scolastici prodotti dagli allievi della Riccini e in parte da materiali di lavoro redatti dalla stessa maestra (appunti su varie discipline, cronache e diari scolastici, minute di programmi didattici dell'insegnante).

Per quanto riguarda la prima tipologia di documenti, ci troviamo davanti a una variegata messe di produzioni scritte: temi, dettati, composizioni, pensierini, riassunti, relazioni, pagine di diario, corrispondenze epistolari, cartoline, diari scolastici³⁶. Rispetto a questi materiali, saltano subito all'occhio due elementi. Innanzitutto le scritture, anche se non sempre sono facilmente collocabili cronologicamente, si concentrano tra gli anni Venti e gli anni Cinquanta del Novecento e presentano alcune importanti lacune temporali, relative agli anni Trenta, al periodo del secondo conflitto mondiale e a quello immediatamente successivo. In secondo luogo, la maggior parte dei materiali rimandano ad un piccolo nucleo di alunni. Possiamo ipotizzare che questi due aspetti non siano frutto di coincidenze, ma che – anche qui – la maestra Riccini abbia agito scientemente, operando scelte selettive tanto da un punto di vista cronologico che quantitativo, al fine di mantenere nel suo archivio solo le testimonianze dei periodi e degli alunni a lei più cari, che maggiormente rappresentavano cioè la sua idea di insegnamento e i frutti più belli e significativi del lavoro fatto a scuola.

Se entriamo nel merito dell'analisi testuale, troviamo pagine rappresentative del clima culturale e storico di ogni periodo. Molti, ad esempio, sono i temi dedicati alla campagna e all'agricoltura. Se prendiamo in considerazione quelli prodotti durante il periodo fascista, notiamo che spesso l'argomento si intreccia con alcuni temi della propaganda del regime. È questo il caso del quaderno di composizioni mensili di lingua italiana di Enzo Papilli, che nella pagina del 20 ottobre 1925, riporta il seguente tema:

La semina del grano – terza parte

Il contadino prima di fare la semina del grano deve preparare bene il campo. L'agricoltore deve adoperare l'aratro che, aggogato ai buoi, scava solchi profondi e rivolta le zolle al sole. Quando il contadino ha finito di lavorare la terra si incomincia a seminare. Il seminatore

³⁶ Una prima analisi delle scritture scolastiche del *fondo Riccini* è proposta, relativamente alla lingua italiana, da Lucia Sanseverinati, *Esperienze di vita all'interno delle scritture infantili, spontaneità espressiva e stereotipia nei componimenti scritti e nelle corrispondenze scolastiche degli alunni della maestra Riccini (1919-1958)*, tesi di laurea in letteratura per l'infanzia, a.a. 2008-2009. La tesi è corredata da una schedatura analitica delle diverse produzioni scritte degli alunni della maestra conservate nel fondo, con una prima sezione dedicata a quaderni, temi, componimenti, pensierini, riassunti, esercitazioni di lingua italiana e diari scolastici; e una seconda sezione riservata alle corrispondenze scolastiche.

mentre sparge il seme, pensa che spunterà una piantina verde prima e, a maggio, nascerà una bella spiga d'orata (sic) piena di bei chicchi. Poi alza gli occhi al cielo e dice una preghiera al Signore che allontani le grandinate dal suo campo. In Italia si fa la battaglia del grano. Possiamo vincerla!³⁷

In chiusura del componimento si richiama la campagna per l'autosufficienza cerealicola, la battaglia del grano, lanciata dal regime nel 1925 e continuata per tutto il Ventennio, che secondo la circolare n. 46 del 28 maggio 1928 doveva essere trattata anche a scuola, con un impegno particolare dei maestri per sensibilizzare gli alunni sul problema del pane³⁸. I riferimenti al fascismo nei quaderni di lingua italiana sono piuttosto blandi. Questo forse si deve al fatto che le produzioni scritte degli anni Trenta – quelle maggiormente interessate dal processo di fascistizzazione – non sono state volutamente conservate dalla maestra. Per trovare una presenza più palese del livello di penetrazione dell'ideologia fascista dobbiamo attingere ai diari scolastici conservati nel *fondo Riccini*.

Introdotta dalla Riforma Gentile del 1923 per favorire pratiche di scrittura quotidiana volte a far emergere il vissuto del bambino, il diario della vita di scuola ben presto si trasformò in uno strumento di diffusione dell'ideologia fascista³⁹. Così è frequente trovarvi pagine che celebrano le ricorrenze e i riti più importanti del regime. Ad esempio, nel diario di Rina Chesi, alunna della quarta elementare, nella pagina del 27 ottobre 1942 si raccontano con dovizia di particolari le celebrazioni del ventennale della Marcia su Roma:

L'altra domenica si è celebrato il ventennale della Marcia su Roma. Noi della G.I.L. non siamo state invitate, ma i Fascisti sì. Le Camicie Nere hanno sentito il discorso del Consigliere Nazionale Gardini, che ha parlato in Piazza XXIV Maggio. La cerimonia si è chiusa con gli inni fascisti. Il Duce fece bene ad ordinare la Marcia su Roma, perché l'Italia governata da Benito Mussolini si avvia verso la forza e la potenza. In questi venti anni di Regime Fascista si sono compiute molte belle opere: la fondazione della G.I.L., la bonifica delle paludi, la battaglia del grano, la fondazione dell'Impero. Che volontà e che genio ha il nostro Duce!⁴⁰

Anche per il periodo successivo alla seconda guerra mondiale abbiamo quaderni che riflettono il contesto storico e sociale del tempo. Ad esempio,

³⁷ Composizioni mensili di lingua italiana di Enzo Papili, Scuola elementare di Ancona, dal 16 settembre 1925, CESCO, RCC, VII, 44.

³⁸ Del Nero, *La scuola elementare nell'Italia fascista*, cit., p. 93.

³⁹ Il Diario di scuola fu introdotto con l'ordinanza ministeriale dell'11 novembre 1923 in applicazione del R.D. 1/10/1923, n. 2185. Sulle valenze storiografiche di questo tipo di fonte si veda: D. Montino, *Bambini, penna e calamaio. Esempi di scritture infantili e scolastiche in età contemporanea*, Roma, Aracne, 2007, pp. 85-120; Id., *La pratica pedagogica del «diario della vita di scuola»*. *Dalla possibilità di una scrittura intima alla necessità di una scrittura disciplinata (1923-1943)*, in A. Castillo Gómez, V. Sierra Blas (edd.), *Mis primeros pasos. Alfabetización, escuela y usos cotidianos de la escritura (siglos XIX y XX)*, Gijón, Ediciones Trea, 2008, pp. 373-390.

⁴⁰ Diario di Rina Chesi della classe 4^a A, presso la scuola elementare «Mazzini» di Ancona, a partire dal 6 ottobre 1942, CESCO, RCC, VII, 48.

nel riassunto del racconto letto in classe intitolato *Il reduce*, svolto dall'alunna Serena Sgalla il 27 aprile 1950, emerge il grande tema dalla ricostruzione che alimenta un nuovo sentimento patrio, non più fondato su astratti valori civili calati dall'alto – come era stato fino a quel momento – ma su un autentico desiderio collettivo di rinascita e di ritorno alla normalità.

Gianni era ritornato alla sua casa che sorgeva sull'Appennino. [...]. Più tardi era scoppiata la guerra che aveva seminato dappertutto rovine e dolori. Gianni aveva sofferto per sé e per gli altri; aveva conosciuto le gioie della vittoria e le umiliazioni della sconfitta. Finita la guerra, Gianni aveva ripreso la via del ritorno. Ma che desolazione! Che disastro! La città che per la prima volta aveva visitato con il babbo, non era che un cumulo di macerie. Ora egli si trova presso la sua casetta, fra i suoi monti [...] più tardi ritorneranno il padre e il fratello e riprenderanno la vita di un tempo [...]. No, Gianni non resterà a lungo lassù, perché sa che l'Italia ha bisogno del lavoro dei suoi figli, per ricostruire ciò che la guerra ha distrutto. Egli presto riprenderà la via del piano, per cominciare i lavori di ricostruzione⁴¹.

Molti sono anche i temi dedicati alla famiglia, alle ricorrenze religiose e civili, e non mancano componimenti incentrati su insegnamenti morali e norme igieniche. D'altra parte la collezione di quaderni conservata nel *fondo Riccini* è veramente molto ricca e la casistica che offre è altrettanto variegata. Queste scritture ci appaiono come 'figlie dell'epoca' a cui appartengono e ci permettono di cogliere un'aderenza di fondo della maestra agli argomenti indicati nei programmi vigenti, ma non ci consentono – a nostro avviso – di recuperare un'immagine completa della reale impronta didattica della Riccini. Si tratta per lo più di scritture disciplinate, che sembrano testimoniare un impianto didattico direttivo e poco incline a lasciare spazio alla spontaneità dell'alunno. D'altra parte come poteva essere altrimenti? D'altronde era questo il taglio didattico prevalente nell'arco cronologico in cui operò la maestra. Ma possiamo veramente arrivare alla conclusione che la Riccini adottò un impianto didattico unicamente impositivo e direttivo, cioè incapace di lasciare spazio alla libera manifestazione del pensiero e dei vissuti infantili? Certamente conservò una selezione delle scritture scolastiche che più si avvicinavano al suo modello ideale di alunno. Ma questo non esclude che nel concreto svolgimento della quotidianità scolastica il mondo interiore dei fanciulli non avesse diritto di cittadinanza. A questo riguardo, altri tipi di fonti ci possono venire in soccorso.

Facciamo riferimento, nello specifico, a programmi e cronache scolastiche e agli appunti di lavoro della maestra. Dall'incrocio tra queste fonti ci appare un quadro più articolato, che lascia trapelare il continuo lavoro della maestra sul fronte dell'aggiornamento didattico e della ricerca di soluzioni educative che non si accontentano di applicare pedissequamente le prescrizioni ministeriali e manualistiche.

⁴¹ Quaderno di italiano di Serena Sgalla, alunna della scuola elementare «Mazzini» di Ancona, 1949-1950, in CESCO, RCC, VII. 276.

6. Indizi sullo «stile educativo»: programmi didattici e cronache scolastiche

Per ricavare informazioni più precise sullo stile educativo della Riccini, abbiamo scelto di concentrare la nostra analisi su quattro programmi scolastici elaborati dalla maestra in differenti periodi storici e di mettere in dialogo questi documenti, laddove possibile, con i giornali e le cronache scolastiche del relativo periodo. Il nostro viaggio tra le carte di scuola della maestra Riccini inizia con il *Programma per la 4^o classe*⁴². Il programma è organizzato per discipline (Nozioni varie e composizione; Grammatica; Aritmetica, Geometrica, Sistema metrico; Storia; Geografia; Educazione morale e istruzione civile) ed è privo di data. Sicuramente non è del periodo fascista, visto che non appaiono riferimenti agli argomenti tipici della scuola del regime. Le titolazioni delle materie, inoltre, (ad es. *Nozioni varie, Educazione morale e istruzione civile*) e la forte impronta laica dei contenuti fanno pensare che il programma risalga ai primi anni di attività della Riccini e comunque ad un periodo antecedente al 1923, visto che non c'è una voce specifica dedicata all'insegnamento della religione, per il quale viene riservato solo qualche brevissimo cenno all'interno dell'insegnamento di storia («L'infanzia di Augusto e Gesù Cristo»⁴³). Alla luce di questi elementi si può legittimamente dedurre che il punto di riferimento di questo programma didattico della Riccini sono i programmi ministeriali per la scuola elementare del 1905⁴⁴. Si tratta, com'è noto, di un testo normativo scritto dal filosofo allievo di Credaro e filo-herbertiano Francesco Orestano, che spicca proprio per la laicità e per la «minuziosità enciclopedica e nozionistica»⁴⁵. In questo caso il lavoro che fa la Riccini con il suo programma per la 4^a classe è di interpretazione e sintesi delle norme ministeriali. La maestra dà ampia prova di riuscire a cogliere appieno l'essenza dei programmi ministeriali, ad esempio laddove annota a proposito dell'insegnamento di *Educazione morale e istruzione civile* che:

Osservazioni. Tutti gli insegnamenti devono cooperare alla cultura morale e civile dell'alunno, per la qual cosa in ogni lezione si deve aver di mira non solamente il fine immediato di dar cognizioni teoriche, ma quello ancora più importante di fissare nella mente dello scolaro delle massime, delle verità morali secondo cui egli deve abituarsi a regolare la propria condotta. Tali massime siano sempre associate a racconti, a casi fatti nascere a bella posta al fine di dar loro forma concreta e muovere la forza del sentimento senza della quale esse non avranno alcun potere sulla volontà⁴⁶.

⁴² Maria Riccini, *Programma per la 4^a classe*, [ante 1923], CESCO, RCC, VII, 82.

⁴³ *Ibid.*, p. 10.

⁴⁴ *Programmi per le scuole elementari (1905)*, «Bollettino Ufficiale del Ministero dell'Istruzione Pubblica», 1905, supplemento al n. 9, pp. 467-544 riportati in F.V. Lombardi, *I programmi per la scuola elementare dal 1860 al 1988*, Brescia, La Scuola, 1987, pp. 189-294, da cui si cita.

⁴⁵ Lombardi, *I programmi per la scuola elementare dal 1860 al 1988*, cit., p. 188.

⁴⁶ Riccini, *Programma didattico per la 4^a classe*, cit., pp. 11-12.

La Riccini, in questo caso, dà prova di una forte deontologia professionale, in quanto mette da parte prontamente – come da indicazioni ministeriali – qualsiasi riferimento a principi e valori religiosi, concentrandosi solo sugli elementi della cultura morale e civile ritenuti utili alla formazione dell'alunno. In tal senso si evince come la maestra concepisca la sua professione con rigore, si percepisce come un funzionario pubblico che, in questo caso, è chiamato a non lasciar trapelare il proprio credo religioso. L'operazione, avendo avuto modo di conoscere il vissuto della maestra, possiamo immaginare che non le costò poca fatica in termini di rinuncia a una dimensione personale. Sappiamo che l'insegnamento della religione era stato reso facoltativo già dalla legge Coppino del 1877, ma è con i programmi del 1905 che si spinge verso un'impronta chiaramente laica di tutto l'impianto dei programmi e la Riccini non si sottrae a questa indicazione ministeriale.

Sul piano più specificatamente didattico la maestra anconetana è in grado di tradurre in pratica uno dei principi cardine dei programmi del 1905, vale a dire quello della centralità dell'insegnamento linguistico⁴⁷. Tant'è che in una delle osservazioni al programma per la 4^a classe, la maestra scrive:

L'insegnamento linguistico deve costituire il nucleo, per così dire, delle varie discipline. E poiché il pensiero, di cui la lingua è espressione, ha le sue basi su ciò che i sensi raccolgono del mondo esterno, bisogna che l'osservazione diretta, i fatti occasionali sotto l'occhio del fanciullo, siano la fonte principale da cui trarre gli argomenti e la composizione. Veri siano dunque i componimenti del primo periodo, e soltanto più tardi e a poco a poco si faccia lavorare l'immaginazione. Per la medesima ragione è opportuno legare direttamente alla lingua le nozioni varie le quali forniscono elementi reali al pensiero, danno un contenuto alla parola, senza di che gli svolgimenti di temi riescono vuote ciancie ostacolanti, anziché favorire lo sviluppo della mente⁴⁸.

Conferma la medesima capacità di assumere e di far proprio lo spirito dei programmi ministeriali nei suoi elementi connotativi anche il paragrafo riservato dalla Riccini alla lettura, laddove la maestra dosa sapientemente lo spazio riservato alla lettura in classe, a quello dedicato alla lettura personale a casa, incentivando la costituzione di una bibliotechina di classe:

Insistere da principio sulla lettura meccanica, mirando specialmente alla correttezza e alla pronuncia ed alla chiarezza dell'espressione. Lettura imitativa. Spiegazione delle cose lette per via di domande, seguita dalla lettura espressiva dello stesso capitolo. Riassunto di letture fatte a casa, curando in modo speciale che l'alunno si esprima con parole diverse da quelle del libro, allo scopo di evitare che la ripetizione sia un semplice esercizio meccanico di memoria. *Bibliotechina circolante e ripetizione settimanale di un raccontino a piacere dell'alunno*. In relazione con la lettura curare gli esercizi di memoria di facili prose e

⁴⁷ *Programmi per le scuole elementari (1905)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 218.; E. Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, Firenze, La Nuova Italia, 1990, pp. 64-65.

⁴⁸ Riccini, *Programma didattico per la 4^a classe*, cit., pp. 2-4.

poesie, facendo osservare le pause, gli accenti e cercando di evitare le accentuazioni rozze e dialettali. I capitoli contenenti cognizioni scientifiche siano preceduti da conveniente preparazione, siano essi il punto di arrivo, non di partenza, per insegnare le nozioni varie. Lettura di manoscritti allo scopo di abituare gli alunni a leggere la scrittura altrui. Esercizi lessicografici. Uso del vocabolario⁴⁹.

Elementi di originalità, invece, si possono desumere in particolare nel paragrafo dedicato al dettato. In questo caso, l'impianto dei programmi ministeriali non solo viene assunto completamente, ma anche integrato e personalizzato, laddove la maestra opera una sua distinzione – del tutto assente nel testo ministeriale⁵⁰ – tra dettato ideologico, pensato per la trasmissione di conoscenze e principi, e dettato ortografico, finalizzato all'esercitazione grammaticale.

Dettato: Il dettato ideologico è in relazione diretta con l'insegnamento della composizione e delle nozioni varie, e la scelta degli argomenti va lasciata alla libertà degli insegnanti. Per il dettato ortografico si osservi la seguente gradazione: esercizi sui raddoppiamenti, sulle parole aventi lettere di suono affine (cuore, cuoco, quadro, questo ecc.); parole tronche; differenze tra parole accentate e parole senza accento (amo, amò, senti, senti); articolo e apostrofo. Esercizi ortografici sui verbi essere e avere, proposizioni articolate e apostrofo [...] ⁵¹.

Altri indizi che lasciano desumere la presenza di una variabile legata al profilo professionale della maestra che va ad interagire con le disposizioni ministeriali si desumono dal programma didattico redatto dalla Riccini nel 1933⁵². Anche questo programma è organizzato per materie (Religione, Canto, Disegno, Bella scrittura, Lettura espressiva, Recitazione, Lettura ed esercizi di lingua, Aritmetica e geometria, Storia, Coltura fascista, Geografia, Nozioni di igiene e scienze, Occupazioni intellettuali ricreative, Educazione fisica, Lavori donneschi). Non è specificata la classe, ma dagli argomenti si può dedurre che si tratti della 5^a. Tale ipotesi è confermata dal confronto con il *Giornale della classe* dell'a.s. 1933-34, in cui figura che la Riccini insegna presso la classe 5^a B della Scuola elementare «Mazzini» di Ancona⁵³. Altro aspetto degno di nota è dato dal fatto che il testo del programma presenta diversi interventi di correzione e integrazione. Dal confronto tra la copia personale del programma presente nell'archivio della maestra e il *Giornale di classe* dell'a.s. 1933-1934 emerge che tali modifiche non furono recepite nel programma didattico riportato nel *Giornale della classe* di quell'anno. Possiamo avanzare l'ipotesi per cui la Riccini ritornò in un secondo momento sul testo, presumibilmente nell'anno scolastico 1938-1939, quando si trovò di nuovo ad insegnare presso una quinta

⁴⁹ *Ibid.*, pp. 5-6.

⁵⁰ *Programmi per le scuole elementari* (1905), cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 225.

⁵¹ Riccini, *Programma didattico per la 4^a classe*, cit., pp. 2-4.

⁵² Ead., [*Programma didattico per la 5^a classe*], a.s. 1933-1934, CESCO, RCC, VII. 84.

⁵³ Ead., *Giornale della classe*, classe 5^a B, a.s. 1933-1934.

classe elementare e le circostanze imponevano una revisione del programma precedentemente stilato. Purtroppo non ci è possibile effettuare un riscontro sistematico tra le aggiunte e i cambiamenti apportati alla copia personale del programma didattico della Riccini e il programma presente nel *Giornale di classe* del 1938-1939, in quanto di questo documento è stata conservata solo la copertina. Ad ogni modo sarà nostra premura sottolineare, di volta in volta, gli interventi più interessanti apportati dalla maestra in un secondo momento al testo del programma dell'a.s. 1933-1934. Siamo in una fase di transizione e, precisamente, nell'anno precedente all'uscita dei nuovi programmi del 1934. La scuola del tempo era stata chiamata a recepire già diversi elementi di novità, per correggere il tiro dei precedenti programmi del 1923, concepiti – com'è noto – secondo una prospettiva culturale ben lontana da quella fascista⁵⁴.

La Riccini in questo testo dimostra un adeguamento al mutato contesto politico-ideologico, il che non stupisce, visto il rapido e massiccio processo di adesione al fascismo che interessò in modo particolare gli insegnanti della scuola elementare⁵⁵. La sezione del *Giornale di classe dell'a.s. 1933-1934* riservata alla *Cronaca ed osservazioni dell'insegnante sulla vita della scuola* si snoda tra le tipiche ricorrenze del regime: anniversario della Marcia su Roma, celebrazione della giornata del Balilla, della Befana Fascista, dell'anniversario della Fondazione dei Fasci di combattimento, della fondazione dell'Opera Nazionale Balilla, della

⁵⁴ Per il testo dei programmi del 1923: *Programmi di studio e prescrizioni didattiche per le scuole elementari (1923)*, in applicazione al R.D. 1° ottobre 1923, n. 2185, «Bollettino Ufficiale del Ministero dell'istruzione Pubblica», a. 1923, n. 51, pp. 4590-4627, in Lombardi, *I programmi per la scuola elementare*, cit., pp. 316-371. Sullo spirito che animò questi programmi si rimanda agli scritti prodotti dal suo estensore: G. Lombardo Radice, *La riforma della scuola elementare. Vita nuova della scuola del popolo*, Palermo, Sandron, 1925; Id., *La riforma della scuola elementare. Scuole, maestri e libri. Raccolta di indagini essenziali*, Palermo, Sandron, 1926. Rispetto ai cambiamenti di rotta introdotti nella scuola prima dei nuovi programmi del 1934 si può rammentare che, come sappiamo, subito dopo le dimissioni di Gentile dalla Minerva, i suoi successori, a cominciare dal ministro Casati, diedero il via alla cosiddetta 'politica dei ritocchi', che introdusse numerosi e consistenti cambiamenti alla Riforma Gentile, anticipando quel processo di progressivo smantellamento-svuotamento della stessa che sarebbe culminato con la Carta della scuola Bottai. Cfr. Ostenc, *La scuola italiana durante il fascismo*, cit., pp. 126-181; Charnitzky, *Fascismo e scuola*, cit., pp. 193-289. Un quadro esaustivo dei cambiamenti introdotti nella scuola del Ventennio dopo il ministero Gentile è offerto da Del Nero, *La scuola elementare nell'Italia fascista*, cit., in partic. pp. 54-129.

⁵⁵ A questo riguardo, è stato notato come proprio i maestri si trovassero in una posizione di maggior fragilità rispetto alle altre categorie di insegnanti, non solo perché generalmente provenienti da un ceto medio basso e da studi meno robusti rispetto, ad esempio, agli insegnanti della scuola media e superiore, ma anche per via dello stretto legame tra scuola elementare e Opera Nazionale Balilla, che rendeva di fatto obbligatoria l'adesione al fascismo, e per questioni prettamente economiche e di opportunità, visto che la tessera al partito dal 1933 in poi era obbligatoria per poter partecipare ai concorsi pubblici ed indispensabile per chi aspirava a progressioni di carriera. A tutto questo si aggiungano l'azione di vigilanza esercitata da ispettori e direttori didattici, gli inevitabili fenomeni di conformismo e le minacce di repressione, che certo contribuirono non poco ad aumentare il numero dei tesserati di circostanza più che per convinzione. Infine, non si dimentichi il giuramento d'ufficio imposto ai maestri a partire dal 1928. Charnitzky, *Fascismo e scuola*, cit., p. 317.

giornata delle due croce per la lotta contro la tubercolosi, della Leva fascista⁵⁶. Numerose sono le notazioni dedicate alle riviste militari, alle parate dei Balilla e delle Piccole Italiane e alle conferenze di cultura fascista per gli insegnanti e non mancano puntuali resoconti sull'andamento degli iscritti all'O.N.B., alla mutualità scolastica e dati sugli assistiti dal patronato scolastico. Le cronache scolastiche redatte negli anni del Ventennio sono pressoché identiche; seguono tutte questo modello. Del resto si tratta di documenti ufficiali, che dovevano essere sottoposti alla lettura dei superiori e difficilmente potevano lasciar trapelare valutazioni di carattere personale o addirittura iniziative contrarie alla vigente normativa. La natura di queste fonti non consente di cogliere il reale livello di adesione al fascismo della Riccini; tuttavia, c'è una costante che ritorna anche nel programma didattico del 1933-1934, nel quale è possibile rintracciare anche un'indubbia attitudine della Riccini a recepire i bisogni formativi delle sue alunne, che va ricondotta in modo specifico alla sua personalità e al suo «credo professionale».

In particolare possiamo notare due linee di tendenza che emergono dal programma didattico del 1933, una applicata ad argomenti più neutri dal punto di vista ideologico-politico, ambiti per cui la Riccini sembra muoversi con maggior libertà, forte anche di una maturità professionale ormai consolidata; l'altra interessa gli argomenti con una robusta connotazione ideologica, che impongono alla Riccini margini di manovra ridotti e soprattutto un ripensamento consistente dei contenuti.

La prima linea di tendenza emerge, ad esempio, nel programma previsto per l'insegnamento della *Religione*, per il quale la Riccini rispetta gli argomenti indicati per la 5^a classe nei programmi Lombardo-Radice, aggiungendo un'interessante integrazione: «Lecture religiose: le leggende dello Stocchiero. Qualche pagina del Manzoni e del Wiseman»⁵⁷. La maestra affianca alle letture del Manzoni, consigliate dai programmi del 1923, altre di sua scelta. In particolare introduce di sua iniziativa due autori, Giuseppe Stocchiero, prolifico scrittore di opere di edificazione religiosa, del quale probabilmente adotta il volume *Fiorita di leggende: da Betlemme al Calvario: per i piccoli e per grandi*, visto che una copia di quest'opera è presente nella sua biblioteca, e Nicholas Patrick Stephen Wiseman, il noto arcivescovo di Westminster, del quale molto probabilmente la Riccini adottò l'opera di narrativa più conosciuta, ovvero *Fabiola o la Chiesa delle catacombe* (1854).

In merito all'insegnamento della religione possiamo notare, inoltre, come l'argomento della preghiera venga trattato con un taglio che anticipa il

⁵⁶ Riccini, *Giornale della classe*, classe 5^a B, a.s. 1933-1934, cit., parte VI. *Cronaca e osservazioni dell'insegnante sulla vita della scuola*. Sui riti e le commemorazioni pubbliche della scuola fascista si veda M. Isnenghi, *Intellettuale militanti e intellettuale funzionari. Appunti sulla cultura fascista*, Torino, Einaudi, 1979, pp. 170-174.

⁵⁷ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 4.

cambiamento che sarebbe stato sancito con l'emanazione dei nuovi programmi per la scuola elementare del 1934, in quanto la Riccini in proposito scrive:

La preghiera, perché si prega. Quando e come si deve pregare (richiamo alla parabola del fariseo e del pubblicano). La preghiera per eccellenza e le altre preghiere cristiane. La preghiera per il Papa, il Sovrano, il Duce, per impetrare la pioggia, il sereno, ecc.⁵⁸

Un'altra disciplina rispetto alla quale la Riccini si muove nella direzione dell'integrazione dei programmi del 1923 è quella del *Disegno*. Anche in questo caso la maestra segue scrupolosamente le prescrizioni ministeriali, includendo nel suo programma il disegno dal vero, per lo più di foglie, fiori e frutta di stagione, e quello spontaneo, per decorare copertine di quaderni, per illustrare poesie, racconti, avvenimenti (come il Natale e la Pasqua). Prevede anche il disegno geometrico per motivi decorativi da riprodurre nelle cornicette dei quaderni o per i lavori donneschi e l'introduzione delle prime nozioni di prospettiva e esercizi di riproduzione di disegni dalla lavagna. Nella chiusura di questa parte di programma, inoltre, si sottolinea quanto segue:

Per tutti i mesi: posto il disegno a sussidio delle varie materie di studio, non mancheranno disegni di cartine geografiche e di solidi geometrici, nonché i disegni per illustrare nozioni od esperimenti d'igiene e di scienze. Compileranno inoltre il calendario della Montesca⁵⁹.

Questo passaggio rivela, ancora una volta, un'adesione piena alle prescrizioni ministeriali che per l'insegnamento del disegno nelle classi superiori alla quarta prevedevano un esercizio particolare ispirato a La Montesca, la scuola rurale fondata da Leopoldo e Alice Franchetti a Città di Castello, che a fondamento del proprio programma scolastico poneva il disegno. Il calendario della Montesca consisteva in un grande cartellone di classe, rinnovato di mese in mese, in cui ogni giorno un alunno a turno inseriva il proprio disegno spontaneo⁶⁰. Risulta invece riconducibile direttamente all'iniziativa della maestra la seguente notazione, nella quale si fa riferimento a:

esercizi per rafforzare la memoria visiva: dapprima riproduzione di un oggetto visto ma non osservato. Poi esecuzione dello stesso disegno dopo accurata osservazione. Infine confronto dei disegni e rilievi delle differenze⁶¹.

Si tratta di un'integrazione delle indicazioni ministeriali, che è riconducibile alla particolare sensibilità mostrata dalla maestra per questo ambito formativo, che coltiva e approfondisce nel tempo in modo personale, come testimonia la ricca raccolta di articoli tratti da «L'arte dei piccoli. Quindicinale per lo studio

⁵⁸ *Ibid.*, p. 1.

⁵⁹ *Ibid.*, p. 7.

⁶⁰ *Programmi di studio e prescrizioni didattiche per le scuole elementari (1923)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., pp. 333-334.

⁶¹ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 5.

del linguaggio grafico infantile», edito proprio in quegli anni (1927-1935) a cura dell'editrice La scuola. Nata come supplemento alla sezione *Didattica* di «Scuola Italiana Moderna», sotto la direzione di Gherardo Ugolini, insegnante elementare e apprezzato autore di libri per ragazzi, la rivista intendeva offrire ai maestri consigli e suggerimenti per interpretare al meglio «l'importanza educativa del disegno», secondo lo spirito dei Programmi Lombardo-Radice. Definita dallo stesso pedagogo catanese come «una deliziosa esposizione di arte fanciullesca», «L'arte dei piccoli» accoglieva nelle sue pagine testi e disegni di bambini, spesso accompagnati dai commenti dello stesso Ugolini, fornendo agli insegnanti pratiche indicazioni sul come valorizzare e incanalare la spontaneità dei fanciulli⁶².

Nell'ambito delle materie che permettono un intervento più ampio dell'insegnante va sicuramente inclusa la *Bella scrittura*. Per questa disciplina i programmi del 1923 sono ricchi di riferimenti⁶³. Si suggerisce di proporre esercizi di riproduzione di modelli calligrafici tracciati dal maestro alla lavagna e di favorire esercizi che abbinino la bella scrittura al disegno. In questo caso la maestra Riccini attinge alla sua ormai lunga esperienza professionale, avendo di mira le esigenze specifiche della sua classe:

Opportuni esercizi per la ripetizione graduale e accurata dell'alfabeto maiuscolo e minuscolo, e per la scrittura delle cifre arabe e dei numeri romani, cercando oltre che togliere i difetti principali, di far sorgere nelle alunne il desiderio di una scrittura chiara e ben formata. Qualche esercizio di bella scrittura per la trascrizione di massime religiose, morali, politiche, igieniche, disegno per la intestazione dei compiti, la scrittura dei frontespizi, ecc. inoltre: compilazione dell'elenco dei libri che formano la bibliotechina di classe, delle alunne lettrici, di eventuali avvisi da comunicare alle famiglie, alle altre classi. Semplicissimo stampatello maiuscolo. Qualche iniziale e monogramma per biancheria⁶⁴.

Questa peculiare attenzione per gli effettivi bisogni formativi delle alunne è confermata dal programma didattico per l'insegnamento dell'*Aritmetica*. Anche in questo caso la maestra non manca di sviluppare le indicazioni ministeriali: estende il periodo numerico oltre i milioni, si occupa di frazioni, di disegno geometrico e di costruzione di solidi e include anche argomenti relativi alla contabilità. In quest'ultimo ambito, a nostro avviso, va ben oltre le «semplici scritture contabili» richieste dai programmi del 1923⁶⁵, animata dal chiaro intento di fornire alle sue alunne competenze concrete da poter spendere nella gestione di «un'azienda domestica»⁶⁶.

⁶² Cfr. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo*, cit., pp. 391 e note.

⁶³ *Programmi di studio e prescrizioni didattiche per le scuole elementari* (1923), cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 334.

⁶⁴ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 8.

⁶⁵ *Programmi di studio e prescrizioni didattiche per le scuole elementari* (1923), cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 341.

⁶⁶ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 16.

Questo doppio crinale di azione dato dall'adesione ai programmi e dall'apporto personale è riscontrabile anche nel paragrafo dedicato alla *Lettura ed esercizi di lingua*. La maestra, come richiesto dalle indicazioni ministeriali, riserva molto spazio alle nozioni di grammatica italiana e all'analisi logica e grammaticale delle proposizioni e del periodo. Include una delle novità più significative dei programmi del 1923, ovvero il Diario della vita scolastica⁶⁷, rispetto al quale scrive: «nel compilarlo le alunne non si limiteranno ad annotare i fatti della loro vita di scolare, ma esporranno pure desideri, riflessioni, propositi ... ecc.»⁶⁸. La maestra non manca di citare letteralmente i programmi ministeriali, laddove afferma: «Altro esercizio scritto di lingua sarà il resoconto delle nozioni di scienze fisiche e naturali accompagnato dalla illustrazione grafica delle osservazioni delle esperienze»⁶⁹ e, in generale, lo spettro complessivo degli esercizi di lingua che propone si attiene scrupolosamente a tutte le prescrizioni ministeriali, anche se la maestra non rinuncia ad inserire elementi riconducibili a quell'idea di scuola palestra per la vita alla quale rimarrà fedele nel corso di tutta la carriera. Per cui, accanto ad esercizi canonici come «le lezioni scritte su fatti di cui la scolara abbia esperienza, talvolta anche nella forma epistolare», i «Riassunti di leggende e di racconti narrati», le «versioni in prosa di qualche poesia», le «relazioni di spiegazioni (specialmente di scienze)» e all'immane notazione sull'uso del vocabolario («Le alunne continueranno ad usare il vocabolario, annotando spesso le spiegazioni di parole poco note e il significato di espressioni poco usate»), troviamo un esercizio che rimanda al concetto di alfabetizzazione funzionale, come quello relativo alla «compilazione di vaglia postali e telegrammi»⁷⁰. Non stupisce notare, invece, che nel programma didattico della maestra manchi un elemento chiave dei programmi del 1923: gli «esercizi di traduzione dal dialetto»⁷¹. D'altra parte siamo nel 1933 e

⁶⁷ Cfr. *supra* nota n. 39.

⁶⁸ Riccini, [Programma didattico per la 5^a classe], a.s. 1933-1934, cit., pp. 12-13.

⁶⁹ *Ibid.*, p. 13. Cfr. Programmi di studio e prescrizioni didattiche per le scuole elementari (1923), cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 338.

⁷⁰ Riccini, [Programma didattico per la 5^a classe], a.s. 1933-1934, cit., p. 13.

⁷¹ Programmi di studio e prescrizioni didattiche per le scuole elementari (1923), cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 338. I programmi Lombardo-Radice, com'è noto, prevedevano esercizi di traduzione dal dialetto all'italiano a partire dalla terza elementare, che erano utilizzati come strumento per acquisire la lingua italiana e per valorizzare le culture locali. Sul tema si veda Catarsi, *Storia dei programmi della scuola elementare*, cit., pp. 92-94 e, più in generale, T. De Mauro, *Giuseppe Lombardo Radice e l'educazione linguistica*, in Id., *Idee e ricerche linguistiche nella cultura italiana*, Bologna, il Mulino, 1980; A. Barausse, M. D'Alessio, «Dalla piccola alla grande patria», *Libri dialettali e almanacchi regionali per la scuola elementare*, in G. Chiosso (ed.), *TESEO '900. Editori scolastico-educativi del primo Novecento*, Milano, Editrice Bibliografica, 2008, pp. XXXI-LXXIV, R. Sani, «Alla scoperta dell'Italia migliore e più ignorata». *Gli Almanacchi regionali per la scuola elementare introdotti dalla riforma Gentile e l'utilizzo del patrimonio culturale e naturale per la promozione dell'identità nazionale e del sentimento di cittadinanza*, in 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, pp. 87-115.

l'orientamento del regime rispetto al dialetto e alla cultura popolare era ben chiaro: andavano messe da parte per favorire una maggior identificazione dei giovani italiani con la nazione⁷².

In questa direzione, non sorprende neanche il fatto che nell'ambito delle *Occupazioni intellettuali ricreative* non compaia il riferimento ai cicli di letture incentrati sul «contributo dato dalla regione alla vita nazionale»⁷³, che pure era uno degli elementi caratterizzanti dei programmi del 1923. La parola d'ordine ora è nazione. Pertanto, la Riccini prevede solo: «cicli di letture per illustrare le figure degli eroi, le bellezze della Patria, il progresso della Nazione»⁷⁴. Sulla tipologia di letture proposte in classe fa luce quanto scritto dalla maestra nel *Giornale di classe* di quell'anno, dal quale emerge che nel mese di novembre propone *Il reuccio degli uccelli* di Giuseppe Ernesto Nuccio, «con l'intento di far comprendere alle alunne l'immenso bene che gli uccelli apportano all'agricoltura», a dicembre *Le rose di Natale, per gli angeli senz'ale* della Cuman Pertile, nei mesi di gennaio, febbraio e marzo alcuni capitoli tratti dal libro *Fiore* di Fanciulli, mentre nei mesi di aprile e maggio attinge alle pagine delle *Figlie d'Italia* di Barbieri e Bettolo⁷⁵. Permane uno degli aspetti maggiormente distintivi delle *Occupazioni intellettuali ricreative*, ovvero quello del favorire il ripasso e il consolidamento delle nozioni apprese in altre discipline attraverso «giuochi di intelligenza»⁷⁶, per cui la Riccini annota tra gli argomenti: «Qualche arguto quesito d'aritmetica. Ricreazioni scientifiche, esperimenti interessanti. Raccolte di materiale vario in relazione a spiegazioni fatte e a ricerche da condurre a termine»⁷⁷.

La pressione della politica di regime appare ancor più evidente nel paragrafo riservato all'*educazione fisica*, per il quale la Riccini si attiene alle prescrizioni dell'Opera Nazionale Balilla:

⁷² Il metodo di insegnamento «dal dialetto alla lingua» introdotto da Lombardo-Radice con i programmi del 1923 subisce una stretta progressiva a seguito dell'inasprimento dell'autoritarismo del regime. Già nel 1925 il ministro Fedele elimina il dialetto dalle prove dell'esame di ammissione alle scuole medie inferiori e toglie l'invito a proporre temi che facciano riferimento «alle esigenze della vita locale». A livello extrascolastico, va rilevato che nel 1931 si giunge a vietare la stampa di qualsiasi produzione dialettale e, in ambito cinematografico, a partire dal 1930, i titoli dialettali sono cambiati o italianizzati. Il regime ha ormai stabilito una politica di autarchia linguistica, che intende eliminare qualsiasi elemento ritenuto 'nocivo' all'affermazione della lingua nazionale, dialetto compreso. Con i programmi del 1934, varati sotto il ministro Ercole, il dialetto viene messo al bando dalla scuola, mentre il monte ore assegnato alla lingua italiana aumenta rispetto a quello previsto per le altre materie. Sul tema si veda l'ormai classico lavoro di G. Klein, *La politica linguistica del fascismo*, Bologna, il Mulino, 1986, in partic., pp. 17-54.

⁷³ *Programmi di studio e prescrizioni didattiche per le scuole elementari*, 1923, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 338.

⁷⁴ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 25.

⁷⁵ Ead., *Giornale della classe*, classe 5^a B, a.s. 1933-1934, cit.

⁷⁶ *Programmi di studio e prescrizioni didattiche per le scuole elementari*, 1923, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 357.

⁷⁷ Riccini, [*Programma didattico per la 5^o classe*], a.s. 1933-1934, cit., p. 25.

Svolgimento del programma fissato dall'O.N.B. comprendente: ordinativi e schieramenti, marcia e corsa; esercizi degli arti superiori e inferiori, del capo e del busto; salti; esercizi di equilibrio; giuochi e passeggiate⁷⁸.

Sebbene, in questo caso, può ancora permettersi spazi di intervento personale, tanto da introdurre una parte del tutto originale, relativa alla cura delle piante:

coltivazione di piantine nei vasetti posti sui davanzali della classe. Le cure e i lavori che si richiedono: innaffiatura, concimazione, mondatura, ecc. osservazioni sullo sviluppo delle piante, l'aprirsi delle gemme, l'effetto delle concimazioni, ecc.⁷⁹.

Anche nel programma di *Geografia* si trovano tracce della particolare stagione storica del momento, che si affiancano alla volontà di mettere in dialogo la propria esperienza professionale con le indicazioni ministeriali. La Riccini non manca di seguire scrupolosamente i programmi del 1923⁸⁰. Parte con il riepilogo degli argomenti svolti nelle classi precedenti, continua con argomenti di geografia fisica e politica dell'Europa e degli altri continenti e include esercizi cartografici. In un secondo tempo, sceglie di dettagliare con maggior precisione la voce «I possedimenti italiani in Africa», aggiungendo la seguente specifica: «Eritrea, Somalia, Libia, Abissinia, estensione ed aspetto, fauna e flora»⁸¹, forse sintomatica della volontà di dare maggior spazio – in sede didattica – ad un argomento strettamente connesso all'attualità dell'Impero fascista in espansione. Ma, ancora una volta, la Riccini non rinuncia ad inserire il suo personale apporto e, di sua iniziativa, include argomenti di geografia astronomica e umana: «Il sole, le stelle, i pianeti, la terra. I movimenti del globo terrestre. La luna e le sue fasi: l'asse terrestre, i poli, l'equatore, i tropici, longitudine e latitudine. Zone, climi, oceani, continenti: razze, lingue e religioni»⁸².

⁷⁸ *Ibid.* Nella legge istitutiva del 3 aprile 1926 si dichiarava esplicitamente, com'è noto, che l'Opera Nazionale Balilla veniva istituita «per l'assistenza e per l'educazione fisica e morale della gioventù» (R.D. 3.4.1926, n. 2247) e nel R.D. del 9 gennaio 1927, con il quale entrava in vigore la legge istitutiva dell'ONB, si dichiarava che il comando dei Gruppi Balilla poteva essere affidato anche ad insegnanti elementari e medi. Di fatto l'educazione sportiva di massa dei giovani dai 7 ai 17 anni divenne di competenza esclusiva dell'ONB e, al fine di rendere capillare l'intervento dell'ONB nelle scuole, con il R.D.L. del 9 agosto 1929 il presidente dell'ONB Ettore Ricci imponeva ai comuni di assicurare l'insegnamento sportivo sotto il controllo e il coordinamento dell'ONB, onde evitare che alcune amministrazioni optassero per la via dell'esonero dall'educazione fisica. Con le circolari del 1930, invece, si incentivò la promozione della campagna di tesseramento all'O.N.B. presso le scuole, chiamando in causa in primis proprio gli insegnanti, che erano invitati ad intensificare la propaganda tra gli studenti. Per un quadro più esaustivo sul tema si rinvia a: C. Betti, *L'Opera Nazionale Balilla e l'educazione fascista*, Firenze, La nuova Italia, 1984.

⁷⁹ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 26.

⁸⁰ *Programmi di studio e prescrizioni didattiche per le scuole elementari (1923)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 346.

⁸¹ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 22.

⁸² *Ibid.*, p. 21.

Diverso, invece, appare il discorso per discipline come la *Letture espressive*, la *Storia* e le *Nozioni di igiene e di scienze*, i cui testi presentano numerose cancellature e parti riscritte ex novo, che appaiano come l'esplicitazione visiva della fatica, e forse anche del disagio, causati dal processo di adeguamento richiesto dalla stagione politica in corso.

Per l'insegnamento di *Nozioni di igiene e di scienze* questo processo di revisione si traduce con una sostanziale aderenza ai programmi del 1923⁸³, per cui si parla del sottosuolo italiano, delle forze idriche, delle malattie sociali e del lavoro e dell'assicurazione contro le malattie e gli infortuni. Anche se la Riccini decide di tralasciare diversi argomenti presenti nelle indicazioni ministeriali, sostituendoli con altri (Il calore, La luce, Il suono e i doveri e diritti del cittadino). Non può passare inosservato, inoltre, il fatto che si dettaglia il discorso relativo alle malattie sociali, parlando di «lotta contro la tubercolosi, sanatori, preventori e dispensatori» e che tra le «forme di attività assistenziale» sono inserite l'Opera Nazionale Maternità e Infanzia e «le colonie estive e permanenti del Regime»⁸⁴, realtà sulle quali lo Stato fascista stava investendo particolari energie proprio in quella fase⁸⁵.

Ancor più marcata è la pressione ideologica del regime per la *Letture espressive*. La Riccini si trova davanti alla necessità di aderire all'imposizione dei testi unici di Stato⁸⁶ e, pertanto, annota:

Letture del libro di Stato *Il Balilla Vittorio* scegliendo di volta in volta i racconti che più siano in relazione con le date ricordate e con le spiegazioni fatte e cercando di ottenere dalle alunne buona pronuncia, giusta intonazione e logica interpretazione. Letture anche degli altri libri di Stato da adottare per la 5^a, cercando i brani più adatti per una buona lettura espressiva. Offriranno pagine per esercizi di lettura espressiva anche i libri della bibliotechina di classe, i migliori giornalini per la fanciullezza, le letterine della corrispondenza interscolastica⁸⁷.

Il testo è rimaneggiato in più punti e sul libro di lettura c'è un significativo ripensamento da parte della Riccini, che in un primo momento aveva optato per *Il Balilla Vittorio* di Forges Davanzati e che, solo in un secondo tempo, sceglie un libro di lettura pensato in modo specifico per le alunne della 5^a classe *Amor di Patria* di Francesco Saponi, che evidentemente riteneva più adatto per

⁸³ *Programmi di studio e prescrizioni didattiche per le scuole elementari (1923)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 349.

⁸⁴ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 24.

⁸⁵ Si può ricordare, ad esempio, che il Ministero della Pubblica Istruzione, poi divenuto Ministero dell'Educazione Nazionale nel 1929, si spese molto sul terreno della Propaganda antitubercolare, con circolari volte a raccomandare l'osservanza delle più importanti norme igieniche e a sostenere la Campagna antitubercolare, avviata per la prima volta nel 1931. Del Nero, *La scuola elementare nell'Italia fascista*, cit., pp. 72, 141. Sull'Opera Nazionale Maternità e Infanzia si rimanda alla monografia di M. Monnanni, *Per la protezione della stirpe: il Fascismo e l'Opera nazionale maternità e Infanzia*, Roma, Sallustiana, 2005.

⁸⁶ Ascenzi, Sani, *Il libro per la scuola nel Ventennio fascista*, cit., pp. 17-31.

⁸⁷ Riccini, [*Programma didattico per la 5^a classe*], a.s. 1933-1934, cit., p. 9.

la sua scolaresca. Tuttavia dal confronto con il *Giornale di classe* di quell'anno notiamo che la Riccini sceglie alla fine di ritornare alla prima opzione, indicando *Il Balilla Vittorio*. Questo elemento ci fa pensare che forse la Riccini abbia rimesso mano alla sua copia personale del programma in un periodo successivo, per ottenere una versione rivista e modifica sulla base dell'effettiva pratica didattica da utilizzare in previsione di un'altra classe quinta da guidare. Tale ipotesi ci sembra avvalorata dal fatto che la prima edizione dell'opera *Amor di Patria* di cui abbiamo notizia risale al 1935, quindi due anni dopo la compilazione dei programmi in questione⁸⁸.

Ma la sezione del programma didattico che presenta più cancellature e parti riscritte ex novo è quella relativa all'insegnamento della *Storia*. La Riccini pensa, in un secondo momento, di unire l'insegnamento della *Storia* con quello della *Coltura fascista*, evidentemente l'operazione le sembrava più funzionale ad una narrazione degli eventi che legasse in un flusso unico i fatti della storia recente alle ultime imprese del regime. Dal raffronto con il *Giornale di classe* dell'a.s. 1933-1934 si evince che la Riccini mantiene la distinzione tra le due materie, ma evidentemente la pratica didattica le suggerì – in un secondo tempo – di operare una fusione. Il programma di studi di quell'anno, comunque, parte dalla caduta dell'impero romano, si concentra sui principali argomenti di storia medievale, si sofferma sullo «splendore della civiltà italiana del '500» e arriva velocemente al periodo della rivoluzione francese e dell'impero napoleonico. Molto dettagliata, invece, è la trattazione del risorgimento e della prima guerra mondiale. Il programma termina, ovviamente, con l'avvento del fascismo e la trattazione delle «grandi opere» del regime⁸⁹. Sull'attuazione del programma nel suo complesso fa un bilancio molto lucido la stessa Riccini nella *Relazione finale dell'insegnante*, riportata al termine del *Giornale della classe* di quell'anno, laddove afferma:

Nello svolgimento del programma ho messo tutta la mia cura; ho fissato, mensilmente, per le varie materie, i punti da svolgere, tenendo conto, più che delle esigenze del programma, delle condizioni reali della mia scolaresca⁹⁰.

Le alunne prima di tutto. Questo sembra essere il principio irrinunciabile sul quale base la sua lunga attività professionale la Riccini, che conclude la sua carriera in una stagione particolarmente felice, quella del secondo dopoguerra e della ricostruzione, nella quale sembra finalmente trovare il suo 'habitat' naturale.

⁸⁸ Del testo Bacigalupi e Fossati (*Da plebe a popolo*, cit., p. 196) indicano una prima edizione nel 1935 e una riveduta nel 1936. Dall'Opac SBN figura solo l'edizione del 1937.

⁸⁹ Riccini, [*Programma didattico per la 5ª classe*], a.s. 1933-1934, cit., p. 18.

⁹⁰ Ead., *Giornale della classe*, classe 5ª B, a.s. 1933-1934, cit., parte X. *Relazione finale dell'insegnante*.

7. Verso un nuovo inizio: gli anni della scuola democratica

Anche in questa fase la maestra marchigiana non manca di applicare le prescrizioni ministeriali, senza però rinunciare a ripensarle autonomamente sulla base del proprio bagaglio di competenze professionali. Questo approccio è confermato dall'analisi del programma didattico che la maestra redige per l'anno scolastico 1956-1957, vale a dire un anno dopo l'emanazione dei nuovi programmi ministeriali del 1955, e per l'anno scolastico successivo 1957-1958.

I programmi del 1955, com'è noto, presentano diversi elementi di novità rispetto a quelli precedenti del 1945⁹¹. Innanzitutto c'è l'introduzione della ciclicità, il primo ciclo di due anni e il secondo di tre. I cicli sono concepiti come unità didattiche con precise finalità: il primo deve consentire «il passaggio dai modi della scuola materna a quelli più propri della scuola elementare», mentre il secondo deve proporre «forme di attività e di apprendimento sistematico che sono più proprie della scuola secondaria»⁹². L'introduzione dei cicli incide anche nella struttura della scuola elementare, comportando l'anticipazione dell'esame di proscioglimento del grado inferiore alla fine della seconda anziché della terza, come era dal 1888. Per quanto riguarda il primo ciclo, poi, non si ha più la distinzione in materie. L'insegnamento ha un carattere globalistico e deve partire dagli interessi e dall'esperienza del fanciullo, stabilendo un contatto costante con l'ambiente circostante. I programmi del 1955, inoltre, hanno un carattere indicativo più che prescrittivo e lasciano molta libertà all'iniziativa degli insegnanti, che sono chiamati ad adeguarsi alle esigenze della classe e dell'ambiente⁹³.

Questa impostazione permette alla Riccini di dare libero sfogo ai suoi convincimenti educativi e didattici. Nel 1956 la maestra anconetana firma i programmi per la 2^a classe elementare femminile dell'anno scolastico 1956-57 insieme alla collega Feliziani⁹⁴. Si tratta di programmi organizzati mensilmente secondo 6 principali aree disciplinari: *Educazione religiosa*, *Educazione morale e sociale*, *Giochi ed altre attività educative*, *Ricerche ed esplorazione dell'ambiente*, *Per la lingua*, *Contare e misurare*. Non abbiamo insegnamenti trattati in maniera separata ed autonoma, come era in passato, ma materie che sono legate l'una all'altra da un unico filo conduttore tematico, che varia di mese in mese e che permette di non avvertire, come richiesto dai programmi, una rigida distinzione

⁹¹ *Programmi didattici per la scuola primaria (1955)*, «Gazzetta Ufficiale della Repubblica Italiana», f. 146, 27 giugno 1955, in Lombardi, *I programmi per la scuola elementare*, cit., pp. 495-514.

⁹² *Programmi didattici per la scuola primaria (1955)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 480.

⁹³ Per una visione globale dei motivi salienti dei *Programmi* del 1955 e del tipo di accoglienza ad essi riservato dalla classe politica ed intellettuale si veda anche Catarsi, *Storia dei programmi della scuola elementare*, cit., pp. 147-164.

⁹⁴ G. Feliziani, M. Riccini, *Programma di lavoro diviso in gruppi mensili*, a.s. 1956-1957, classe 2^a femminile, CESCO, RCC, VII. 86.

tra le materie. Così il mese di novembre è dedicato alla scuola, quello di dicembre alla propria casa, quello di gennaio agli animali dell'«ambiente domestico e dei nostri cortili»⁹⁵, nel mese di febbraio si parla del corpo e delle sue meraviglie, nel mese di marzo della bella stagione, ad aprile si parla della strada e si termina con il mese di maggio interamente dedicato all'osservazione della natura⁹⁶.

Se guardiamo al programma previsto per i singoli insegnamenti, possiamo notare delle peculiarità che danno corpo all'istanza prima posta dai programmi del 1955, ovvero

Che la casa della scuola sia sempre più rispondente alle esigenze della vita operosa, serena, educativa che vi si deve svolgere, in armonia con le necessità sociali e didattiche del nostro tempo; tale, insomma, da porre la scuola in contatto con l'ambiente e con la vita della comunità sociale, di cui essa deve essere il centro⁹⁷.

All'insegnamento della *religione* viene riservato molto spazio. Del resto non poteva essere altrimenti, visto che gli stessi programmi del 1955 ponevano l'insegnamento religioso a «fondamento e coronamento» «dell'educazione integrale del fanciullo» e stabilivano di concordare il programma con l'autorità ecclesiastica competente. A questo si aggiunga, come elemento non certo secondario, la solida fede religiosa della maestra Riccini, che abbiamo avuto modo di far emerge in precedenza.

Sul versante dell'*educazione morale e sociale* si coglie l'intento di guidare l'alunna a percepirsi come parte integrante di una comunità, che ha le sue regole e che impone un comportamento preciso e dei doveri da rispettare a scuola, così come a casa e anche per la strada.

Il comportamento della brava scolarotta: giunge puntuale, si presenta pulita e ordinata, prega con devozione, ha cura dell'aula e della suppellettile scolastica, è rispettosa con l'insegnante e gli altri superiori, è gentile verso le compagne, non sciupa quanto le serve per la scuola. L'assegnazione di qualche incarico di fiducia⁹⁸.

Persone di famiglia che abitano nella stessa nostra casa, come Gesù nella casetta di Nazareth, così ogni bambina cerchi di essere obbediente e servizievole. Quali aiuti ella può dare per tenere pulita e ordinata la casa⁹⁹.

Anche per la strada, che è un po' la casa di tutti, bisogna essere educati. Il comportamento della brava bambina nella via e con i passanti. Ciò che non si deve fare in istrada. Atti di gentilezza. La roba trovata per la via¹⁰⁰.

⁹⁵ *Ibid.*, p. 7.

⁹⁶ Notiamo che gli argomenti in programma si muovono sulla falsariga dello *Schizzo di un programma per l'insegnamento intuitivo* proposto da Lombardo Radice nelle *Lezioni di didattica e ricordi di esperienza magistrale*, sesta edizione, Palermo, Sandron, 1923, pp. 193-194.

⁹⁷ *Programmi didattici per la scuola primaria (1955)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 489.

⁹⁸ Feliziani, Riccini, *Programma di lavoro diviso in gruppi mensili*, a.s. 1956-1957, cit., novembre, p. 1.

⁹⁹ *Ibid.*, dicembre, pp. 4-5.

¹⁰⁰ *Ibid.*, aprile, secondo foglio, p. 1.

Un altro argomento che ricorre nel programma delle maestre anconetane in merito all'educazione morale e sociale è quello del rispetto verso tutti gli esseri viventi:

Gli animali sono essi pure creature del buon Dio ed essi pure sentono il dolore; non dobbiamo, quindi, maltrattarli, ma dobbiamo volere, anche a loro, un po' di bene. Raccolta di favolette e poesie relative agli animali osservati¹⁰¹.

Il rispetto dei nidi, la minuscola casa costruita con tanto amore e tanta pazienza. Chi distrugge i nidi, ove son deposte le piccole uova e gli uccellini implumi, non ha buon cuore. Anche nelle gabbiette, gli uccellini soffrono, lì sono come in prigione¹⁰².

Il tema dell'amore verso le creature si sposa con quello della solidarietà verso il prossimo, incoraggiato dai programmi del 1955¹⁰³:

Pietà ed aiuto fraterno per i deboli, i malati, gl'infelici¹⁰⁴.

Anche il lavoro più umile deve essere tenuto in considerazione, quando va a vantaggio degli altri. Anche il Redentore si dedicò ad un umile mestiere e scelse gli Apostoli tra i pescatori. Chi vive ozioso, invece, non è utile né a sé, né agli altri¹⁰⁵.

Non manca l'attenzione verso la cura e l'igiene della persona, così come sono presenti temi legati al particolare contesto dell'Italia post-bellica, che mostrano la sensibilità delle maestre Riccini e Feliziani nei riguardi dell'incolumità delle loro alunne:

Si deve avere cura del nostro corpo, evitando ciò che può recar danno alla salute e ubbidendo, se malate, alle prescrizioni mediche. [...] Attenzione e prudenza nella strada. Non giocare con i residui bellici¹⁰⁶.

Sul fronte dei *Giocchi ed altre attività espressive* si spazia dai giochi da compiere in classe («Camminare nel corridoio in punta di piedi in ordine sparso senza urtarsi»¹⁰⁷) ai classici giochi da cortile (Chi tardi arriva, male alloggia; Moscacieca; «qualche giuoco con la palla»¹⁰⁸); dalla cura delle piante che adornano l'aula¹⁰⁹ ai piccoli esperimenti di coltivazione di semi e bulbi piantati e custoditi a turno dalle alunne¹¹⁰; dalla raccolta di racconti e illustrazioni a tema a quella di foglie e fiori di stagione, fino agli immancabili esercizi di

¹⁰¹ *Ibid.*, gennaio, p. 7.

¹⁰² *Ibid.*, marzo, p. 11.

¹⁰³ *Programmi didattici per la scuola primaria (1955)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 488.

¹⁰⁴ Feliziani, Riccini, *Programma di lavoro diviso in gruppi mensili*, a.s. 1956-1957, cit., febbraio, p. 9.

¹⁰⁵ *Ibid.*, aprile, pp. 13-14.

¹⁰⁶ *Ibid.*, febbraio, p. 9.

¹⁰⁷ *Ibid.*, novembre, p. 1.

¹⁰⁸ *Ibid.*, novembre, p. 2; dicembre, p. 4; foglio 2, p. 2.

¹⁰⁹ *Ibid.*, novembre, p. 2.

¹¹⁰ *Ibid.*, gennaio, p. 7; marzo, p. 11.

recitazione di poesie, scenette, indovinelli e scioglilingua, possibilmente legati al ciclo delle stagioni e alle principali festività religiose (natale e pasqua). Vi sono anche attività più particolari, connesse a precisi periodi dell'anno, come quello della costruzione di un piccolo presepe di classe¹¹¹ o a argomenti affrontati in altri ambiti, come nel caso della costruzione di un orologio di cartone¹¹². Sono presenti altresì attività tipiche di una classe femminile, come le esercitazioni di cucito¹¹³.

Sotto la voce *Ricerche ed esplorazioni dell'ambiente*, invece, troviamo argomenti che mostrano la chiara volontà di accompagnare le alunne nella scoperta dei luoghi a loro più prossimi, come la scuola, la propria casa e la strada, che in alcuni casi si prestano ad osservazioni sui cambiamenti che questi ambienti hanno subito nel corso delle varie epoche storiche, o sui vari mestieri e mezzi che popolano questi contesti.

Il casamento scolastico. Dove sorge. Portone e scale. Corridoi. Aule e cortili. L'illuminazione del casamento. Il busto di Mazzini. L'ufficio del Sig. Direttore e della Segreteria. Il locale per la refezione. L'impianto radiofonico. Il telefono. La campanella. Il riscaldamento. Strade e piazze nei pressi della scuola [...] ¹¹⁴.

La casa ove la bimba abita. In quale via e a che numero si trova. Le stanze che la compongono e le case che vi si trovano accanto. La storia di una casa. Case di altri tempi. Illuminazione e riscaldamento nelle case di oggi. La benedizione annuale della casa. La casa degli animali: pollaio, conigliera, stalla, formicaio, nido, alveare, ovile ¹¹⁵.

La mia strada: aspetto, persone, veicoli, norme della strada, palazzi e negozi, altre cose notevoli. Persone che vi passano: lo spazzino, il portalettere, il vigile, i venditori ambulanti, ecc. Inoltre: biciclette e motociclette, automobili e camion, autobus ¹¹⁶.

Per quanto riguarda lo studio della *lingua* le maestre anconetane si propongono di partire sempre dalle osservazioni e dalle ricerche compiute dalle alunne relativamente all'argomento trattato in quel mese, per continuare poi con letture tratte da libri e da giornali ed esercitazioni varie a queste correlate (dettatura, brevi rielaborazioni personali, ricerche di parole, disegni dal vero e spontanei).

Anche l'insegnamento della *matematica*, che apparentemente potrebbe sembrare quello più difficile da trattare congiuntamente agli altri, muove da esercizi di numerazione e da semplici problemi legati al tema dominante del mese. Pertanto, essendo il mese di novembre quello dedicato alla scuola, sotto la voce *Contare e misurare* troviamo i seguenti esercizi:

¹¹¹ *Ibid.*, dicembre, p. 4.

¹¹² *Ibid.*, gennaio, p. 7.

¹¹³ *Ibid.*

¹¹⁴ *Ibid.*, novembre, p. 1.

¹¹⁵ *Ibid.*, dicembre, p. 4.

¹¹⁶ *Ibid.*, aprile, foglio 2, p. 1.

Contare i quadretti appesi ad una parte dell'aula, i banchi di una fila, i pastelli di una compagna, le foglie posate sulla cattedra, le pagine di un quaderno, le cose che s'incontrano nell'esplorare l'ambiente¹¹⁷.

Così, laddove abbiamo un mese di febbraio dedicato all'osservazione del corpo e delle sue meraviglie, rispetto all'insegnamento della matematica abbiamo esercizi del tipo «Calcolare i piedini di 5 bimbi, di 7 bimbi ... la differenza per gli 8 dentini di un bimbetto e i 12 dentini della sorellina ecc.»¹¹⁸.

Per avere un saggio di questa trattazione correlata tra le varie materie possiamo citare il mese di maggio¹¹⁹, che mostra con grande efficacia l'intento di stimolare nel fanciullo l'acquisizione di abilità e competenze che muovono dal suo ambiente e dalla sua capacità di osservare il mondo circostante.

MAGGIO

[...]

Educazione religiosa. Il mese della Madonna. La nostra mamma celeste e la sua vita umile e santa. I soavi titoli con cui La invochiamo. La Madonna Regina del cielo e della terra. La pia pratica del mese mariano. [...]

Educazione morale e sociale. Il ricordo di Maria Bambina sproni le alunne ad assomigliarLe un po' ... specialmente nell'obbedienza e nella purezza. Anche nei giuochi all'aperto, favoriti dalla bella stagione, bisogna essere attente, ciò che si deve evitare per mantenersi sane: non bere quando si è sudate, girare lontane dalla polvere ecc.

Giochi ed altre attività educative. All'aperto, qualche gioco con la palla. Cure per le piante della classe e del giardino. Facili lavoretti di cucito. Recitazione di qualche poesia.

Ricerche ed esperienze ambientali. Osservazioni relative a questo mese: l'aspetto dei prati, dei campi, dei giardini, degli alberi, gli uccelli, gli insetti, le lucertole ...

Per la lingua. Conversazioni relative alle osservazioni fatte durante il mese. Lettura spedita e espressiva con brevi riferimenti orali. Dettatura in relazione alle notizie apprese e qualche difficoltà ortografica riscontrata negli esercizi scritti. Riflessione scritta come nei mesi precedenti. Gare di lettura. Disegno spontaneo e dal vero.

Contare e misurare: contare i petali di un fiore, di tanti fiori. Prezzo di un fiore, di un maggiolino ecc. Contare le ciliegie, dividerle, ecc. [...]¹²⁰

Anche il programma didattico per l'anno scolastico 1957-1958, dedicato alla 3^a classe elementare, è organizzato mensilmente, da novembre a maggio¹²¹. Per ogni mese le materie trattate sono raggruppate in sette paragrafi: *Religione; Educazione morale, civile e fisica; Storia, geografia, scienze; Aritmetica e geometria; Lingua italiana; Disegno e bella scrittura; Attività manuali e pratiche.* Compare, come richiesto dai programmi del 1955 per il secondo ciclo, una prima precisa distinzione tra le materie d'insegnamento, anche se non viene

¹¹⁷ *Ibid.*, novembre, p. 3.

¹¹⁸ *Ibid.*, febbraio, p. 10.

¹¹⁹ *Ibid.*, maggio, foglio 2, pp. 2-3.

¹²⁰ *Ibid.*

¹²¹ Maria Riccini, *Piano annuale di lavoro*, a.s. 1957-1958, 3^a classe femminile, CESCO, RCC, VII. 79.

abbandonata completamente l'impostazione globalistica, che mira a cercare la connessione tra le diverse discipline e a favorire la gradualità del processo di apprendimento¹²². È interessante notare, a questo riguardo, che per gran parte del programma scolastico, l'insegnamento di *Educazione morale e civile* procede di pari passo a quello della *Storia, geografia e scienze*, per cui – come era stato per il primo ciclo – si affronta lo stesso argomento da prospettive diverse, cominciando con la casa, la scuola e la strada, per procedere con l'esplorazione dell'ambiente cittadino e concludere con un focus sull'Italia.

Nello specifico, l'insegnamento di *Educazione morale e civile* continua ad essere concepito come una prima forma di educazione alla cittadinanza attiva e responsabile. Si parte dalle prime nozioni di galateo da applicare a casa, a scuola e per la strada:

Il comportamento della bambina in casa, verso i genitori, i fratelli, le sorelle, i nonni L'esempio di Gesù, che 'cresceva in sapienza e in grazia'. La cortesia con i vicini di casa¹²³. La vita serena nella minuscola società della scuola. Ogni alunna ha, però, i suoi piccoli doveri verso se stessa, verso le compagne, verso i superiori. Propositi da fare e da mantenere, all'inizio dell'anno scolastico¹²⁴.

Il mondo di andare per la via. La gentilezza con i passanti. Sgarberie che non si devono fare per la strada¹²⁵.

Si continua con alcune elementari cognizioni di educazione stradale («Attente alle segnalazioni del vigile e del semaforo! Prudenza nei crocicchi specialmente»¹²⁶) e di educazione al «rispetto del patrimonio pubblico»¹²⁷, al «rispetto e all'amore per gli alberi, per le zone verdi della città» e per gli animali¹²⁸. Si introducono le prime conoscenze di convivenza civile e democratica attraverso le norme comportamentali da tenere con le proprie compagne di gioco:

nei giochi, tra bambine, non deve mancare la gentilezza dei modi. Tener conto nello scegliere il gioco, anche del desiderio delle compagne di giuoco. [...]. Avere premure di sorelline maggiori per le bimbe più piccine. Astenersi dai giuochi pericolosi e dagli scherzi di cattivo genere¹²⁹.

Si conclude il programma con un'introduzione al concetto di patria e di amor patrio, veicolati secondo i consueti canoni ottocenteschi, attraverso l'esempio di

¹²² *Programmi didattici per la scuola primaria (1955)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 488.

¹²³ Riccini, *Piano annuale di lavoro*, a.s. 1957-1958, cit., novembre, pp. 3-4.

¹²⁴ *Ibid.*, dicembre, p. 6.

¹²⁵ *Ibid.*, gennaio, p. 9.

¹²⁶ *Ibid.*

¹²⁷ *Ibid.*, febbraio, p. 11.

¹²⁸ *Ibid.*, marzo, p. 14.

¹²⁹ *Ibid.*, aprile, pp. 16-17.

grandi figure del passato espressioni del genio italico e attraverso quello di eroi che hanno immolato la loro vita in nome dell'Italia libera.

L'Italia nostra, tanto bella e gloriosa, dobbiamo amarla e onorarla sempre! Qualche grande italiano da ricordare: Dante, Raffaello, Marconi ... Qualche eroe glorioso che morì per la libertà dell'Italia: Baracca, Toti, Sauro ... La nostra memore riconoscenza verso i caduti. Il bel tricolore della Patria nostra. La festa del lavoro¹³⁰.

Rispetto agli insegnamenti di *Storia, geografie e scienze* si mira ad una progressiva conoscenza del territorio italiano in ordine alla storia antica (romana), alle caratteristiche geografiche e ai principali fenomeni fisici. Si parte, al solito, dalle realtà più vicine all'alunna, la casa e la scuola, si continua con il comune, la provincia, la regione, per arrivare a «uno sguardo a tutta l'Italia»¹³¹. Il taglio dato è sempre lo stesso: trovare un *fil rouge* che crei connessioni tra le varie discipline. Così, ad esempio, nel mese di febbraio¹³² l'esplorazione dell'ambiente cittadino «verso il porto», diviene occasione per parlare di argomenti inerenti la geografia umana, la storia, il mondo naturale e alcuni fenomeni fisici:

La distesa del mare e la linea dell'orizzonte; lo scalo, i moli, le navi; le banchine e la stazione marittima, il cantiere navale e l'arco di Traiano. Il mare e le sue ricchezze: il sale, pesce, corali, perle, spugne. Altre distese d'acqua: laghi e stagni; i pozzi. L'acqua che scorre nei fiumi, nei ruscelli, nei torrenti. Fiumi non lontani dalla nostra città. I tanti usi a cui serve l'acqua, i tre stati dell'acqua. Il biondo fiume che bagna Roma¹³³.

Per l'insegnamento della *lingua*, accanto ai consueti compiti di dettatura, scrittura e di acquisizione delle norme grammaticali, troviamo spesso la presenza di esercizi di traduzione dal «dialetto alla lingua»¹³⁴. La Riccini ancora una volta interpreta le indicazioni ministeriali che invitavano gli insegnanti a far sì che i loro alunni evitassero di confondere «i modi del dialetto coi modi della lingua», individuando occasioni per «disabitarli dagli idiotismi e dai solecismi»¹³⁵.

Ma fin qui, non notiamo nulla di particolarmente originale, anche quando la Riccini propone per l'*Aritmetica e la geometrica* problemi desunti dalla vita di tutti i giorni.

¹³⁰ *Ibid.*, maggio, p. 19.

¹³¹ *Ibid.*, maggio, p. 19.

¹³² *Ibid.*, febbraio, pp. 11-12.

¹³³ *Ibid.*

¹³⁴ *Ibid.*, gennaio, p. 8; marzo, p. 14; aprile, p. 18.

¹³⁵ *Programmi didattici per la scuola primaria (1955)*, cit., in Lombardi, *I programmi per la scuola elementare*, cit., p. 512.

Qualche esercizio di calcolo in relazione alla vita familiare: spesucce che si fanno dal fruttivendolo; le paia di calze rammendate; piatti da riporre, insistendo sui concetti basilari di molto e poco ... più grande e meno grande ... aggiungere, togliere ... prendere tante volte, dividere ...¹³⁶.

La maestra anconetana si attiene alle prescrizioni ministeriali che, per il secondo ciclo della scuola elementare, offrono numerosi spunti a livello di argomenti e di applicazioni didattiche. Eppure dalla lettura del programma della Riccini dell'anno scolastico 1957-1958 per la 3^a classe elementare emerge qualche elemento riconducibile ai personali orientamenti didattici della maestra. Lo desumiamo, ad esempio, da una notazione iniziale al programma, che recita:

Nello stendere il piano di lavoro, per questo anno di scuola, non ho annotato, mese per mese, l'attivo e interessante lavoro delle 'ricerche' che le alunne svolgeranno per i vari centri di studio e, soprattutto, per estendere ed approfondire le loro osservazioni sull'ambiente da 'esplorare'. Ma quel lavoro sarà fatto sicuramente; sarà fatto con gioia e con notevole vantaggio¹³⁷.

Ora, non sappiamo declinare con esattezza il modello didattico a cui la Riccini fa riferimento quando parla dei "centri di studio", ma comunque ci rimandano ad un'idea di didattica attiva e partecipativa, che muove dall'esperienza viva degli alunni e prevede un loro coinvolgimento diretto. Si tratta di una modalità didattica che evidentemente la Riccini collega alle attività di ricerca che aveva già promosso nell'anno scolastico precedente e alla quale la grande parte delle alunne era già abituata. Possiamo avanzare l'ipotesi per cui i "centri di studio" si identificano con i vari poli di interesse tematico individuati dalla maestra nel programma didattico, rispetto ai quali promuove anche attività di ricerche di gruppo. Questa ipotesi ci sembra avvalorata da quanto riportato dalla Riccini nelle *Osservazioni particolari sull'attività educativa dell'insegnante e sullo svolgimento dei programmi* poste a chiusura del Registro di classe dell'a.s. 1957-1958:

Tenendo presente il piano di lavoro predisposto nello scorso novembre, ho avviato le alunne all'esplorazione dell'ambiente domestico, scolastico, cittadino, abituandole ad osservare ciò che vedevano e ad esprimere ciò che avevano osservato. Il lavoro delle 'ricerche!' È piaciuto, soprattutto alle più intelligenti e volenterose. La compilazione delle 'schede' ha accompagnato il lavoro delle ricerche; il lavoro è stato ora individuale, ora collettivo¹³⁸.

La Riccini aderisce a quel metodo naturale promosso sulle pagine di «Scuola Italiana Moderna» in quegli anni, basato sulla compenetrazione tra «lavoro libero», «ricerca personale» e «interventi dell'insegnante», che vedeva

¹³⁶ Riccini, *Piano annuale di lavoro*, a.s. 1957-1958, cit., novembre, p. 4.

¹³⁷ *Ibid.*, p. 1.

¹³⁸ Maria Riccini, *Registro della classe 3^a femminile*, a.s. 1957-1958, *Osservazioni particolari sull'attività educativa dell'insegnante e sullo svolgimento dei programmi*, CESCO.

proprio nella compilazione di schede di lavoro redatte dagli stessi alunni un efficace strumento didattico, capace di integrare e in qualche caso anche di sostituire il libro di testo, stimolando il contributo personale degli scolari nella rielaborazione dei contenuti di apprendimento¹³⁹.

Il bilancio fatto dalla maestra su questa nuova esperienza didattica e, nel complesso, sullo svolgimento dell'intero anno scolastico è decisamente positivo. Siamo al secondo anno di applicazione dei nuovi programmi del 1955. La Riccini ha avuto modo di prendere maggior confidenza con le nuove indicazioni ministeriali, che sembrano rispondere appieno al suo ideale di scuola ed è la maestra stessa, in un certo senso, a rivelarcelo nelle *Osservazioni particolari sull'attività educativa dell'insegnante e sullo svolgimento dei programmi*, incluse nel registro di classe dell'a.s. 1957-1958, l'ultimo della sua carriera.

[...] non da tutte le alunne ho sempre ricevuto partecipazione attiva e diligente alle occupazioni scolastiche! Quali le cause? Per alcune lo scarso interesse anche per una certa debolezza fisica. Però, il programma ministeriale, notevolmente 'alleggerito' in confronto degli scorsi anni, mi ha dato la possibilità di procedere senza fretta ed ha consentito, anche a parecchie delle scolare meno pronte, di non restare troppo indietro. Il programma ho potuto svolgerlo interamente. Adesso nel chiudere questa breve relazione (la 40^{ma} ed ultima, per me!) penso che l'opera di noi maestre non debba essere limitata all'apprendimento di queste o quelle nozioni, ma debba essere rivolta anche a ingentilire gli animi e ad aprire alla bontà i cuori! E mi pare di non essermene dimenticata nei tanti giorni passati a scuola!¹⁴⁰

Con il suo consueto stile sobrio e misurato, la Riccini prende congedo dalla scuola e dalle sue scolarette, come era solita chiamarle, lasciando trasparire l'entusiasmo e la dedizione con le quali fino all'ultimo svolge il suo ruolo educativo, fedele interprete fino alla fine di un'idea di scuola dei sentimenti e per la vita, che proprio negli ultimi anni di carriera può attecchire in un clima politico e sociale più rispondente alla sua visione esistenziale.

Conclusioni

La straordinaria ricchezza della documentazione conservata all'interno del *fondo Riccini* ci ha offerto molti elementi per rintracciare i fili rossi dell'attività magistrale della maestra marchigiana, consentendoci di giovarci dell'apporto di diverse tipologie di fonti, ognuna a suo modo fondamentale ai fini della ricostruzione del profilo professionale della docente marchigiana. La particolarità del fondo, che unisce materiale librario a documenti personali della

¹³⁹ Domenica Scotti, *Scuola che vive. Ricordi ed esperienze educative e didattiche*, «Scuola Italiana Moderna», 20 ottobre 1957, p. 24.

¹⁴⁰ *Registro della classe 3^a femminile*, a.s. 1957-1958, *Osservazioni particolari sull'attività educativa dell'insegnante e sullo svolgimento dei programmi*, cit.

maestra rappresenta un *unicum* nel suo genere e, dunque, un'occasione preziosa per entrare nel vivo della quotidianità professionale di un'insegnante. Questo è stato proprio l'intento principale che ha mosso la presente ricerca: penetrare il vissuto scolastico, andare alla ricerca delle tracce che permettono di ricostruire l'autentico svolgersi delle dinamiche docente-discente, per proporre un modo nuovo di indagare la storia magistrale capace di offrire una "prospettiva dal di dentro".

L'analisi dei libri e delle riviste conservate da Maria Riccini, nello specifico, ci ha permesso di arrivare alle matrici culturali dell'azione educativa della maestra, rivelando una personalità autonoma, ferma nelle sue convinzioni, che aderisce propriamente solo a due "credi": quello religioso e quello della scuola. Il primo le deriva dall'educazione familiare e da una profonda adesione personale ai valori cattolici; l'altro è quello della professione, che sposa con rigore. Ciò la fa avvicinare all'idealismo pedagogico e didattico di Giuseppe Lombardo Radice e alle reali esigenze degli alunni, per i quali sceglie di volta in volta gli insegnamenti che, in coscienza, sente come più coerenti con la stagione che sta vivendo, cercando – però – di non tradire mai i riferimenti essenziali che sono stati la pietra miliare della sua esistenza personale e professionale: la religione cattolica e il valore dell'infanzia.

Attraverso l'esame delle scritture scolastiche e delle carte di scuola della Riccini (programmi didattici e cronache scolastiche), invece, abbiamo tentato di individuare gli elementi caratterizzanti dello 'stile educativo' della maestra. Andando oltre le prime impressioni superficiali, è stato possibile cogliere un'impronta didattica che non può essere liquidata in modo semplicistico come banalmente prescrittiva, in quanto rivela una costante attenzione ai bisogni dei fanciulli, che la portano a reinterpretare le indicazioni ministeriali sulla base delle proprie competenze professionali, al fine di trovare – a seconda della fase storica attraversata – interstizi o veri e propri spazi di autonomo intervento, in grado di corrispondere alle concrete istanze formative della classe.

Se ne ricava l'immagine di un'insegnante che vive la propria professione non come 'soluzione di ripiego', ma come autentica vocazione, interpretata con convinzione e forte senso del dovere nei confronti delle istituzioni, degli alunni e delle rispettive famiglie. Ne emerge il profilo di un'insegnante che attraversa numerose stagioni pedagogiche (herbertimo, neoidealismo, personalismo) e storiche (età giolittiana, Ventennio fascista, fase repubblicana), nel corso delle quali si propone di individuare un percorso formativo ordinato e graduale per la sua scolaresca, capace nel contempo di tener conto degli interessi e delle necessità dei fanciulli, senza però tradire il dettato dei Programmi ministeriali di volta in volta in vigore. Nella gestione di questo delicato 'gioco di equilibri' trova dunque, a nostro parere, la sua massima espressione l'identità professionale della maestra marchigiana, che mostra una singolare pervicacia nella mediazione tra indicazioni teoriche e pratica didattica, guidata dalla convinzione che in essa si realizzi la vera e propria essenza di un mestiere, al quale sente di aver dedicato

tutta la sua esistenza non invano, ma in nome di un disegno superiore, che nel suo caso l'ha chiamata a misurarsi con un contesto cruciale per il benessere dell'umanità: la scuola.

Cataloghi commerciali dei materiali scolastici e collezioni storiche dei sussidi didattici. Nuove fonti per la storia dell'industria per la scuola in Italia (1870-1922)*

Marta Brunelli
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
marta.brunelli@unimc.it

Between the School supplies catalogues and the schools' teaching collections. New sources for the history of the educational industries in Italy (1870-1922)

ABSTRACT: The article presents the first results of a research on the history of production and circulation of school materials in Italy between the late 19th and the first half of the 20th century. The starting point of this work is the analysis carried out on some teaching materials still preserved in the historic collections of seven schools, and which have been studied not only in their educational nature but also in their quality of industrial products

* Il presente articolo è frutto della rielaborazione e ampliamento di una prima ricerca, di tipo più generale, che è stata presentata nel 2014 alla conferenza internazionale *Education et culture matérielle en France et en Europe du XVI^e siècle à nos jours* (Bordeaux, April 29-30, 2014) con il titolo *For a history of the industrial production of teaching materials in Italy between the late nineteenth and the first half of the twentieth century: first indications and research perspectives*. Al momento in cui viene chiuso il presente lavoro, quel testo è in corso di stampa per i tipi di Honoré Champion: M. Brunelli, *Pour une histoire de la production industrielle des matériels didactiques en Italie de la fin du XIX^e a la première moitié du XX^e siècle: premières indications et perspectives de recherche*, in M. Figeac-Monthus (ed.), *Éducation et culture matérielle en France et en Europe du XVI^e siècle à nos jours*, Paris, Honoré Champion, 2018, pp. 109-132). Ringrazio il collega Juri Meda per il proficuo confronto avuto in questi anni su temi di comune interesse di ricerca, e i professori Roberto Sani e Anna Ascenzi per i loro preziosi suggerimenti storico-metodologici oltre che bibliografici. Un particolare debito di gratitudine va ai dottori Roberta De Angelis, Federica Clementi, Jessica Fioretti, Cristina Cerretani ed Efreem Bonvecchi per avermi autorizzato a riprodurre le fotografie da loro realizzate durante la realizzazione del lavoro di tesi, oltre naturalmente a tutti i dirigenti scolastici e ai docenti che in questi anni ci hanno permesso di accedere alle collezioni scolastiche conservate nei loro istituti.

and object of consumption. Moving from an in-depth analysis of some anatomical models, the author illustrates a research methodology based on a systematic comparison of school objects, commercial catalogues and the ministerial teaching prescriptions. The triangulation of information from multiple sources, allows outlining the birth and development of the school market and industry in Italy in the period 1870-1922.

EET/TEE KEYWORDS: History of Education; School Industries; Teaching Aids; Historical-educational Heritage; Historical Research; Italy; XIXth-XXth Centuries.

Premesse. La cultura materiale della scuola, un campo di ricerca dalle grandi potenzialità

La ricerca oggetto del presente contributo si colloca all'interno degli studi sulla cosiddetta *cultura materiale della scuola* intesa come quel campo d'indagine che ha assunto le caratteristiche di un filone sempre più autonomo, nell'alveo del ben più ampio ambito della *cultura scolastica*, e sempre più rilevante dal punto di vista della ricerca storico-educativa dell'ultimo quindicennio.

Il concetto di cultura della scuola racchiude in sé una molteplicità di idee e di definizioni frutto di un dibattito che – a partire dall'emergere del concetto di cultura antropologicamente intesa come un «insieme complesso che include la conoscenza, l'arte, la morale, il diritto, il costume e qualsiasi altra capacità e abitudine acquisita dall'uomo come membro di una società»¹ – nel tempo si è dipanato sotto molteplici prospettive disciplinari che, dalla sociologia alla psicologia, dall'educazione speciale all'*educational management*, di volta in volta hanno esplorato il complesso rapporto che intercorre tra scuola e cultura². Pur nella specificità di ogni singolo approccio disciplinare, le ricerche hanno individuato il proprio focus nell'idea che la scuola – in virtù del suo essere il riflesso di una data società e, al tempo stesso, un micro-sistema dotato di una sua propria organizzazione interna – è un territorio dinamico e in continua interazione con il mondo esterno. Come tale, la scuola è il luogo in cui si declina e articola una molteplicità di concetti di «cultura della scuola»: da una parte, la cultura che la scuola ha il compito di trasmettere, dall'altra la cultura che l'istituzione scolastica produce nel suo operare quotidiano (una cultura che è diversa non solo in ogni ordine e grado scolastico, ma che contraddistingue ogni singolo istituto scolastico), per finire con le sotto-culture espresse dai tanti

¹ E.B. Tylor, *Alle origini della cultura*, Roma, Edizioni dell'Ateneo, 1985-1988, p. 9 (trad. it. de: *Primitive culture, Researches into the development of mythology, philosophy, religion, language, art and custom*, London, Murray, 1871).

² Per un'analisi critica dell'evoluzione di questo concetto rimando all'esaustiva voce «School Culture» curata da Diana Gonçalves Vidal e André Paulilo per la *Oxford Research Encyclopedia of Education* (DOI: 10.1093/acrefore/9780190264093.013.59, data di pubblicazione: Gennaio 2018, ultimo accesso: 10 luglio 2018).

attori che gravitano attorno alla realtà scolastica (dalla *pupil culture* alla cultura degli insegnanti, fino alle micro-culture etniche, di genere ecc. rappresentate all'interno di ogni singola classe scolastica)³.

Alla luce di questa complessità, anche gli storici dell'educazione hanno offerto il proprio contributo e, a partire dai lavori e dalle concettualizzazioni avanzate da André Chervel⁴ e Dominique Julia⁵, il concetto di cultura scolastica si è gradualmente affermato come una nuova categoria storiografica capace di riorientare la ricerca storico-educativa e di spostarne l'oggetto di studio dalla storia delle idee pedagogiche e delle politiche scolastiche ad un'indagine di più ampio respiro che abbraccia ogni aspetto della cultura scolastica e della sua storia⁶. Riprendendo il noto passo di Julia in cui la *culture scolaire* è definita come «un ensemble de normes qui définissent des savoirs à enseigner et des conduites à inculquer et un ensemble de pratiques qui permettent la transmission de ces savoirs et l'incorporation de ces comportements»⁷, possiamo affermare che il nuovo campo di ricerca si presenta agli storici dell'educazione come un territorio assai complesso e che si articola in tre principali componenti⁸:

1. la *componente cognitiva*, rappresentata non solo dai saperi e dalle conoscenze oggetto di insegnamento, ma anche da idee, credenze, valori e norme che sono trasmessi all'interno della scuola;
2. la *componente comportamentale*, costituita dalle pratiche scolastiche funzionali a quella trasmissione, come anche dalle condotte codificate, attese e messe in atto (e, perciò, trasmesse) nell'ambiente scolastico;

³ Su questo continuo oscillare tra una concezione olistica della *school culture*, e una più frammentata in molteplici *school sub-cultures*, si muovono i saggi raccolti nel volume collettaneo curato da Jon Prosser: *School Culture*, London, Paul Chapman Publishing Ltd, 1999.

⁴ A. Chervel, *La culture scolaire. Une approche historique*, Paris, Belin, 1998 (in partic. il cap. I: «L'histoire des disciplines scolaires», pp. 9-56); Id., *L'histoire des disciplines scolaires. Réflexions sur un domaine de recherche*, «Histoire de l'éducation», vol. 38, 1998, pp. 59-119.

⁵ D. Julia, *La culture scolaire comme objet historique*, in A. Nóvoa, M. Depaepe, D. Soto Arango, E.V. Johanningmeier (edd.), *The colonial experience in education. Historical issues and perspectives*, vol. monogr. di «Paedagogica Historica. Supplementary series», vol. 1, 1995, pp. 353-382 (disponibile in traduzione italiana: *Riflessioni sulla recente storiografia dell'educazione in Europa: per una storia comparata delle culture scolastiche*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 3, 1996, pp. 119-147).

⁶ In questo filone si collocano i pionieristici lavori degli studiosi belgi (M. Depaepe, F. Simon (*Is there any Place for the History of 'Education' in the 'History of Education'? A plea for the History of Everyday Educational Reality in-and outside Schools*, «Paedagogica historica», vol. 30, n. 1, 1995, pp. 9-16), spagnoli (A. Viñao Frago, *Por una historia de la cultura escolar: enfoques, cuestiones, fuentes*, in *Culturas y civilizaciones. III Congreso de la Asociación de Historia Contemporánea*, Universidad de Valladolid, Valladolid, 1998, pp. 167-183; A. Escolano, *Las culturas escolares del siglo XX: encuentros y desencuentros*, «Revista de Educación», n. Extraordinario (2000), pp. 201-218) e britannici (I. Grosvenor, M. Lawn, K. Rousmaniere (edd.), *Silences and Images. The Social History of the Classroom*, New York, Peter Lang, 1999).

⁷ Julia, *La culture scolaire comme objet historique*, cit., p. 354.

⁸ U.E.M. Fabietti, R. Malighetti, V. Matera, *Dal tribale al globale. Introduzione all'antropologia*, Milano, Bruno Mondadori, 2012.

3. infine, la componente materiale consistente negli oggetti fisici e materiali (dagli arredi fino ai sussidi) che vengono prodotti in funzione della stessa quotidianità scolastica.

Specificamente quest'ultimo aspetto – attinente alla materialità scolastica – è gradualmente emerso nell'ultimo quindicennio come un nuovo, ulteriore e sempre più autonomo filone di ricerca che, individuato sotto il nome di *cultura materiale della scuola* (già noto come *Cultura material de la escuela* in ambito iberico, o come *Materialities of schooling* nella ricerca anglosassone), ha trovato sempre più spazio nella ricerca storico-educativa internazionale. Alla luce del nuovo baricentro storiografico, davanti allo storico della scuola si è materializzata così una sempre più ampia gamma di nuove fonti che, sempre Julia, aveva iniziato a delineare: dai carteggi dell'archivio scolastico ai manuali scolastici, dai periodici pedagogici e magistrali alle corrispondenze e autobiografie di insegnanti o allievi, dai diari e quaderni scolastici alle scritture infantili⁹. A questo lungo novero di fonti documentarie si sono aggiunti – in anni più recenti – le cosiddette *fonti materiali* costituite dall'armamentario didattico dell'insegnante, dal corredo dello scolaro, infine dai materiali e dalle suppellettili che fisicamente strutturavano gli spazi, i tempi e le pratiche dell'insegnamento, inevitabilmente condizionando le modalità in cui la cultura scolastica veniva prodotta e trasmessa.

Il *materialistic turn* che ha interessato la storiografia educativa internazionale ha fatto sì che, oggi, la cultura materiale della scuola sia studiata sotto una molteplicità di prospettive che, anche sul versante italiano¹⁰, hanno dato vita a ricerche inedite riguardanti una vasta gamma di materialità scolastiche che in precedenza erano state raramente considerate dagli storici. In questi anni gli studi hanno riguardato, ad esempio, i diari e i quaderni scolastici intesi non più solo come fonti testuali e come raccolte di scritture scolastiche ma anche come oggetto materiale¹¹; o ancora altre e nuove fonti materiali rappresentate dall'aula

⁹ D. Julia, *L'historien et l'archive*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 5, 1998, pp. 9-18.

¹⁰ Sull'evoluzione della ricerca storico-educativa italiana alla luce dei nuovi paradigmi storiografici rimando a J. Meda, *La «historia material de la escuela» como factor de desarrollo en la investigación histórico-educativa en Italia*, in P.L. Moreno Martínez, A. Sebastián Vicente (edd.), *Patrimonio y Etnografía de la escuela en España y Portugal durante el siglo XX. III Foro Ibérico de museísmo Pedagógico-V Jornadas Científicas de la SEPHE*, Murcia, SEPHE-CEME de la Universidad de Murcia, 2012, pp. 17-32; Id., *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016.

¹¹ D. Montino, *Le parole educate. Libri e quaderni tra fascismo e Repubblica*, Milano, Selene, 2005; J. Meda, *Quaderni di scuola. Nuove fonti per la storia dell'editoria scolastica minore*, «Annali di storia dell'educazione e delle istituzioni scolastiche in Italia», n. 13, 2006, pp. 73-98; Id., *La politica quotidiana. L'utilizzo propagandistico del diario scolastico nella scuola fascista*, «History of Education & Children's Literature», vol. 1, n. 1, 2006, pp. 287-313; *I quaderni di scuola tra Otto e Novecento*, Sez. Monogr. di «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 13, 2006, pp. 11-189; G. Genovesi (ed.), *Il quaderno umile segno di scuola*, Milano,

scolastica¹² e dai suoi arredi¹³, dall'architettura scolastica¹⁴, dalle fotografie scolastiche¹⁵; per finire con le numerose tipologie di sussidi che costituivano il complesso armamentario didattico dell'insegnante composto da una gamma amplissima di sussidi che spaziano dai materiali didattici e pedagogici per la

FrancoAngeli, 2008; J. Meda, D. Montino, R. Sani (edd.), *School Exercise Books. A Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, 2 vols., Firenze, Polistampa, 2010; J. Meda, *The Exercise Book as a Material Object*, in Meda, Montino, Sani (edd.), *School Exercise Books*, cit., vol. I, pp. XXV-XXVIII; R. Sani, *Bilancio della ricerca sui quaderni scolastici in Italia*, in J. Meda, A. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España: balance y perspectivas*, Macerata, eum, 2013, pp. 83-103.

¹² F. Pruneri, *Oltre l'alfabeto. L'istruzione popolare dall'Unità d'Italia all'età giolittiana: il caso di Brescia*, Milano, Vita e Pensiero, 2006, pp. 116-123; Id., *L'aula scolastica tra Otto e Novecento*, «Rivista di storia dell'educazione», n. 1, 2014, pp. 63-72.

¹³ F. De Giorgi, *Appunti sulla storia del banco scolastico*, «Rivista di storia dell'educazione», n. 1, 2014, pp. 85-98; Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, cit.; Id., *Dalla disciplina al design. L'evoluzione del banco scolastico in Italia tra Ottocento e Novecento*, in G. Biondi, S. Borri, L. Tosi (edd.), *Dall'aula all'ambiente di apprendimento*, Firenze, AltraLinea Edizioni, 2016, pp. 129-150; M. Brunelli, J. Meda, *Gymnastics between school desks: an educational practice between hygiene requirements, health care and logistic inadequacies in Italian primary schools (1870-1970)*, «History of Education Review», vol. 46, n. 2, 2017, pp. 178-193.

¹⁴ P. Giorgi, *Sviluppi dell'edilizia scolastica in Italia (XIX-XX secolo)*, in Biondi, Borri, Tosi (edd.), *Dall'aula all'ambiente di apprendimento*, cit., pp. 109-127; M. Marcarini, *Pedarchitettura. Linee storiche ed esempi attuali in Italia e in Europa*, Roma, Studium, 2016; M. D'Ascenzo, *Le esperienze di scuole all'aperto in Italia nel primo Novecento. Avvio di un'indagine*, in M. Tomarchio, L. Todaro (edd.), *Spazi formativi, modelli e pratiche di educazione all'aperto nel primo Novecento*, Milano, Maggioli, 2017, pp. 101-122.

¹⁵ P. Giorgi, *La fotografia nella scuola*, in *Alle radici dell'identità nazionale: Italia Nazione culturale*, Roma, Gangemi, 2011, pp. 213-24; P. Giorgi, E. Franchi (edd.), *L'obiettivo sulla scuola. Immagini dall'archivio fotografico INDIRE*, Firenze, Giunti, 2012; L. Vanni, *Tra banchi, quaderni e calamai: la storia materiale della scuola nelle immagini della Fototeca storica INDIRE*, «Studi sulla formazione», n. 2, 2015, pp. 209-224; M. Brunelli, *Las fotografías escolares como «objetos sociales». Primeras reflexiones sobre el uso educativo y social del patrimonio fotográfico en el museo de la escuela*, in A. Badanelli Rubio, M. Poveda Sanz, C. Rodríguez Guerrero (edd.), *Pedagogía museística. Prácticas, usos didácticos e investigación del patrimonio educativo*, Madrid, Universidad Complutense de Madrid, 2014, pp. 203-217; Ead., *School Photographs. Suggestions for a Participatory Museology*, in T. Stylianou-Lambert (ed.), *Museums and Visitor Photography. Redefining the Visitor Experience*, Edinburgh-Boston, MuseumsEtc, 2016, pp. 471-497; Ead., *Snapshots from the Past. School Images on the Web and the Construction of the Collective Memory of Schools*, in C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories: New trends in the history of education*, Cham, Springer International Publishing, 2017, pp. 47-64.

scuola dell'infanzia¹⁶ agli armadi-museo e alle cassette didattiche¹⁷, da cartelloni didattici e dalle carte murali¹⁸ ai sussidi ginnastici¹⁹ e così via.

Tematiche di ricerca, queste, su cui già nel 2011 Giorgio Chiosso, concludendo il proprio intervento al I *Workshop Ítalo-Español de Historia de la Cultura Escolar* a Berlanga de Duero, aveva appuntato la propria attenzione, indicando proprio nello studio della «produzione che si è svolta in parallelo con l'editoria scolastica vera e propria [...] come sussidi didattici, strumenti per gli esercizi fisici, carte geografiche e arredi per le scuole» un nuovo e interessante filone di ricerca per gli storici dell'educazione italiani²⁰.

1. Nuove fonti per lo studio della «industria scolastica»: i cataloghi commerciali

A favorire in questi anni la nascita di nuovi filoni d'indagine nella direzione indicata da Giorgio Chiosso ha certamente contribuito la crescente disponibilità di materiali scolastici a cui gli studiosi possono, oggi più di ieri, avere facile accesso.

Mi riferisco alle raccolte organizzate nei sempre più numerosi musei del patrimonio storico-scolastico, ma anche ai “giacimenti” di materiali scolastici ancora conservati dalle scuole di antica fondazione dove, sempre più spesso, assistiamo alla nascita di importanti progetti di catalogazione e di valorizzazione

¹⁶ M. Ferrari, M. Morandi, E. Platé, *La lezione delle cose: oggetti didattici delle scuole dell'infanzia mantovane tra Ottocento e Novecento*, Mantova, PubliPaolini-Comune di Mantova, 2008; M. Ferrari, M. Morandi, E. Platé, *Lezioni di cose, lezioni di immagini. Studi di caso e percorsi di riflessione sulla scuola italiana tra XIX e XXI secolo*, Parma, Spaggiari-Edizioni Junior, 2011.

¹⁷ M. D'Ascenzo, R. Vignoli (edd.), *Scuola, didattica e musei tra Otto e Novecento: il Museo didattico “Luigi Bombicci” di Bologna*, Bologna, Clueb, 2008; F.D. Pizzigoni, *Imparare a imparare attraverso il museo scolastico: tracce di nuove potenzialità di uno strumento didattico tardo-ottocentesco*, «Form@re», vol. 15, n. 3, 2015, pp. 142-158.

¹⁸ M. Cossetto, *Cartelloni didattici, quadri murali, tavole parietali*, in M. Cossetto, S. Spada Pintarelli (edd.), *Museo della Scuola-Schulmuseum*. Dossier di «StoriaE», vol. 7, nn. 1/3, 2009, pp. 53-54; F. Targhetta, *Teaching with Images Between 19th and 20th Centuries: the Case of the Italian School Publisher Paravia*, in «Strenæ. Recherches sur les livres et objets culturels de l'enfance», n. 8, 2015, <<http://strenae.revues.org/1392>> (ultimo accesso: 10.06.2018); S. Oliviero, *Domenico e Luigi Giannitrapani geografi per la scuola*, in G. Bandini (ed.), *Manuali, sussidi e didattica della geografia. Una prospettiva storica*, Firenze, Firenze University Press, 2012, pp. 95-102.

¹⁹ D.F.A. Elia, *Giuseppe Pezzarossa's (1880-1911) gymnastics equipment workshop*, «History of Education & Children's Literature», vol. 7, n. 1, 2012, pp. 469-488; Id., *Ginnastica e mezzi di educazione di massa: Pietro Gallo e l'introduzione del bastone jäger in Italia (1878)*, in *Atti del Convegno di Studi Cirse. Sguardi della storia. Luoghi, figure, immaginario e teorie dell'educazione* (CD-Rom allegato a «Rivista di Storia dell'Educazione», vol. 3, n. 2, 2016).

²⁰ G. Chiosso, *La manualistica scolastica in Italia: tematiche, metodologie, orientamenti*, in Meda, Badanelli (edd.), *La historia de la cultura escolar en Italia y en España: balance y perspectivas. Actas del I. Workshop Ítalo-Español de Historia de la Cultura Escolar. Berlanga de Duero, 14-16 de noviembre de 2011*, cit. da p. 59.

culturale e didattica. Tra i tanti, esempi particolarmente significativi sono rappresentati, da una parte, dal progetto «Vuoi costruire il tuo museo scolastico?» ideato dalla rete Museiscuola@ del Servizio Archivi, Museo e Patrimonio Culturale della Città di Torino che, dal 2011 a oggi, ha supportato e continua a supportare la realizzazione di nuovi musei scolastici curati dagli stessi studenti nelle scuole cittadine di ogni ordine e grado; un progetto che, oggi, punta alla realizzazione di un catalogo collettivo informatizzato dei beni scolastici²¹. Un altro esempio virtuoso è costituito dall'Associazione delle Scuole Storiche Napoletane che – costituitasi nel 2011 come una rete di scuole centenarie statali di ogni ordine e grado – oggi coordina nei vari istituti che vi aderiscono importanti attività di recupero, restauro, catalogazione e infine di valorizzazione, tanto di natura culturale consistenti nella realizzazione di mostre, cataloghi e pubblicazioni, seminari e altri eventi, quanto di natura propriamente didattica, incorporando cioè lo studio dei materiali storico-didattici all'interno delle singole didattiche disciplinari o attraverso progetti interdisciplinari di ampio respiro²².

Come si vede, il recupero e la valorizzazione delle collezioni presenti sul territorio può dare vita a meccanismi virtuosi di buone pratiche che finiscono per impattare positivamente sia sulla didattica sia sulla conoscenza stessa delle caratteristiche del patrimonio storico-educativo italiano, della sua nascita e della sua evoluzione. Particolarmente in relazione a quest'ultimo aspetto va segnalato, infatti, che questi “giacimenti” del patrimonio storico-scolastico custodiscono anche altre, nuove fonti le quali – benché ancora poco indagate dalla storiografia educativa – si rivelano tuttavia di potenziale interesse per lo storico dell'educazione. Mi riferisco ai *cataloghi commerciali* che le case produttrici di materiali scolastici stampavano per reclamizzare e vendere i propri prodotti.

In Spagna, a partire dalle ricerche avviate alla fine degli anni '90 da Léon Esteban Mateo che per primo ha evidenziato le potenzialità di questi materiali come fonti informative funzionali alla ricerca storica²³, i cataloghi scolastici

²¹ Il progetto, che usufruisce della consulenza scientifica dell'Indire, è coadiuvato da Francesca Davida Pizzigoni. Informazioni aggiornate sono disponibili sul sito <<http://www.comune.torino.it/museiscuola/partecipa/index.shtml>> (ultimo accesso: 20.07.2018). Sul catalogo virtuale cfr. F.D. Pizzigoni, *Del patrimonio de una escuela al patrimonio de todas: reflexiones sobre el catálogo virtual de los museos escolares de Turín*, in P. Dávila, L.M^a. Naya (edd.), *Espacios y Patrimonio Histórico-Educativo*, Donostia, Erein, 2016, pp. 1199-1210.

²² Sull'Associazione e sulle sue attività si veda il sito <www.forumscuolestorichenapoletane.it/> (ultimo accesso 20.07.2018). Un interessante esempio di valorizzazione didattica interdisciplinare è costituito dalla catalogazione informatizzata delle strumentazioni scientifiche realizzata da docenti e studenti degli istituti aderenti alla rete: cfr. il progetto *NEMO-Network Educational Museums OnLine* coordinato dalla prof.ssa Gioia Molisso del Liceo Classico «Vittorio Emanuele II» <<http://progettonemo.it/>> (ultimo accesso: 20.07.2018).

²³ L. Esteban, *Los catálogos de librería y material de enseñanza como fuente iconográfica y literario-escolar*, «Historia de la Educación», n. 16, 1997, pp. 17-46.

non librari sono stati usati per indagare diversi aspetti della cultura materiale della scuola come l'insegnamento della scrittura²⁴, l'evoluzione degli arredi scolastici²⁵, la diffusione dei sussidi e del metodo froebeliani²⁶ o la storia della didattica della scienza²⁷ o della matematica²⁸, infine la storia di singole case commerciali²⁹. A conferma di quanto detto in apertura di questo paragrafo, non è un caso che questi studi si siano sviluppati proprio presso quelle università in cui la presenza di musei e collezioni scolastiche (come a Salamanca) e di centri di ricerca (come il *Centro de Estudios sobre la Memoria Educativa* (CEME) dell'Università di Murcia) garantisce l'accessibilità a consistenti raccolte sia di cataloghi che di materiali scolastici. In questo modo, studiosi come Pedro Luis Moreno Martínez e Ana Sebastián Vicente hanno potuto sviluppare una prima classificazione dei cataloghi, arrivando a formulare una definizione dei *catálogos de material de enseñanza* come una specifica categoria di fonti riconoscibili dalle seguenti caratteristiche:

- si presentano come liste prodotte a stampa sotto forma di libro, rivista o locandina;

²⁴ L. Esteban, *La academización de la escritura. Modelos e instrumentos para aprender a escribir en la España del siglo XIX y comienzos del XX*, in A. Escolano Benito (Dir.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 315-344.

²⁵ L. Esteban Mateo, *El mobiliario escolar o la evolución de la arqueología material de la escuela en España (1875-1945)*, in *La escuela en Elche. Una mirada histórica al mundo de la enseñanza*, Elche, Museo Escolar Agrícola de Pusol, 2000, pp. 267-296; P.L. Moreno Martínez, *History of School Desk Development in Terms of Hygiene and Pedagogy in Spain (1838-1936)*, in M. Lawn, I. Grosvenor (edd.), *Materialities of Schooling. Design, technology, objects, routines*, Oxford, Symposium Books, 2005, pp. 71-95; P.L. Moreno Martínez, *El mobiliario escolar en los catálogos de material de enseñanza: consideraciones metodológicas*, in P. Dávila, L.M^a. Naya (edd.), *La infancia en la historia: espacios y representaciones*, 2 vols., San Sebastián, Erein, 2005, vol. 1, pp. 342-355).

²⁶ M.J. Martínez Ruiz-Funes, *Los catálogos de material de enseñanza como fuente para el estudio de la cultura material: la recepción y difusión del método Froebel en España*, in Moreno Martínez, Sebastián Vicente (edd.), *Patrimonio y Etnografía de la escuela en España y Portugal durante el siglo XX*, cit., pp. 265-277.

²⁷ J.M. Bernal Martínez, J.D. López Martínez, P.L. Moreno Martínez, *Museos pedagógicos y enseñanza de las ciencias: de las láminas y colecciones a los recursos didácticos virtuales*, in *I Encuentro Iberoamericano de Museos Pedagógicos y museólogos de la educación*, Santiago de Compostela, Xunta de Galicia, 2008, pp. 413-426; J.D. López Martínez, J.M. Bernal Martínez, *El material de enseñanza como recurso didáctico en la Historia de la Educación*, in *El Patrimonio histórico-educativo y la enseñanza de la Historia de la Educación*, Murcia, Sociedad Española de Historia de la Educación, 2009 (serie Cuadernos de Historia de la Educación, n. 6), pp. 53-92.

²⁸ D. Carrillo Gallego, *Los catálogos de material escolar como fuente de la historia de la educación matemática: el caso de los ábacos*, «Historia y Memoria de la Educación», n. 7, 2018, pp. 573-613.

²⁹ P.L. Moreno Martínez, J.P. Marín Murcia, *La casa comercial Cultura y la oferta de material pedagógico moderno en España (1924-1934)*, in A.M. Badanelli Rubio, M. Poveda Sanz, C. Rodríguez Guerrero (edd.), *Pedagogía museística: prácticas, usos didácticos e investigación del patrimonio educativo. Actas de las VI Jornadas Científicas de la SEPHE*, Madrid, Universidad Complutense de Madrid-Facultad de Educación, 2014, pp. 523-531.

- sono pubblicate con periodicità determinata o a scadenze puntuali;
- vengono diffuse a fine pubblicitario attraverso istituzioni, imprese o persone dedite alla produzione, distribuzione e vendita all'ingrosso o al dettaglio;
- sono dedicate a ogni tipo di materiali per l'uso scolastico o educativo;
- descrivono nella totalità, o in gran parte, gli oggetti in vendita con vari livelli di dettaglio, con o senza fotografie/illustrazioni;
- ma sempre indicandone il prezzo, le condizioni di vendita e di pagamento³⁰.

Anche in Italia, oggi, cataloghi di materiali scolastici sono presenti presso i centri di ricerca sul patrimonio storico-educativo come presso i sempre più numerosi musei della scuola, infine presso gli archivi storici e le biblioteche degli istituti scolastici di antica fondazione.

Ma se i cataloghi commerciali delle case editrici scolastiche sono stati studiati per la ricostruzione della storia dell'editoria scolastica ed educativa³¹, lo stesso non è accaduto per i cataloghi dei materiali non librari, che restano una fonte ancora relativamente sottoutilizzata dagli storici dell'educazione. Una prima dimostrazione del potenziale euristico di queste fonti arriva dal lavoro di Juri Meda il quale proprio dallo studio dei cataloghi commerciali è partito per mettere a fuoco la nuova categoria storiografica da lui definita dei «mezzi di educazione di massa» intesi come quell'ampia gamma di sussidi, arredi e materiali di consumo che, a partire dal XIX secolo, iniziano ad essere prodotti, venduti e consumati in larga scala all'interno del nuovo “mercato scolastico”, diventato *di massa* con l'avvento dell'istruzione obbligatoria³². Questi materiali offrono infatti la possibilità di avviare analoghe ricerche sulla

³⁰ P.L. Moreno Martínez, A. Sebastián Vicente, *Los catálogos de material de enseñanza y la cultura material de la escuela. La colección del Centro de estudios sobre la memoria educativa (Ceme) de la Universidad de Murcia*, in Moreno Martínez, Sebastián Vicente (edd.), *Patrimonio y Etnografía de la escuela en España y Portugal durante el siglo XX*, cit., pp. 293-309. I corsivi sono miei.

³¹ Come noto, in Italia gli studi italiani – dopo gli studi pionieristici di Marino Raicich negli anni '80 – hanno raggiunto un livello di eccellenza, testimoniato dalle importanti campagne di censimento e studio sia della produzione libraria per la scuola, sia della storia degli editori scolastici. Si segnalano, in particolare, i fondamentali repertori *Teseo (Tipografi e editori scolastico-educativi dell'Ottocento)*, a cura di G. Chiosso, Milano, Editrice Bibliografica, 2004) e *Teseo 900 (Editori scolastico-educativi del primo Novecento)*, a cura di G. Chiosso, Milano, Editrice Bibliografica, 2008) oltre alla banca dati *EDISCO: i libri per la scuola e l'istruzione tra il 1800 e il 1900*, <<http://www.edisco.unito.it/>> (ultimo accesso: 20.07.2018), che hanno aperto una feconda stagione di studi su questi temi.

³² J. Meda, «Contro il tanto deprecatato mercantilismo scolastico»: *i controversi rapporti tra produttori di quaderni, insegnanti e cartolai e l'intervento del regime fascista*, in Meda, Montino, Sani (edd.), *School Exercise Books. A Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, cit., vol. 1, 2010, pp. 507-551; Id., «Mezzi di educazione di massa». *Nuove fonti e nuove prospettive di ricerca per una storia materiale della scuola tra XIX e XX secolo*, «History of Education & Children's Literature», vol. 6, n. 1, 2011, pp. 253-279; Id., *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016.

nascita e sull'evoluzione, in Italia, di quelle che Pierre Moeglin³³ ha definito *les industries éducatives* e che, nel corso dell'800 ovvero con il consolidamento dei sistemi nazionali dell'istruzione obbligatoria, hanno preso forma nei vari paesi occidentali, pur assumendo ciascuna caratteristiche proprie e specifiche del contesto culturale, politico ed economico di ogni nazione.

Ma in che modo i cataloghi commerciali dei materiali scolastici possono essere utilizzati per ricostruire il complesso panorama industriale e commerciale sviluppatosi in Italia a cavallo tra XIX e XX secolo? E soprattutto, possono questi particolari documenti entrare in dialogo con altre fonti, dalle tradizionali fonti di natura documentaria, normativa o pedagogica, fino alle fonti di natura archivistico-scolastica o, naturalmente, di tipo materiale e oggettuale, ricavate dalle stesse collezioni del patrimonio storico-educativo?

2. Dalla catalogazione alla ricostruzione della «objects' biography» dei sussidi didattici: un possibile metodo di lavoro con i cataloghi scolastici

Un esempio di come i cataloghi commerciali di materiali scolastici non librari possano rivelarsi una fonte storica di primaria importanza – soprattutto se i dati da essi ricavati vengono comparati, triangolati e integrati con quelli ricavati dalle fonti rappresentate dai reperti scolastici conservati nei musei o nelle scuole – è offerto dai risultati di una prima ricognizione sul campo, da me avviata nel 2009 attraverso l'assegnazione di alcune tesi di censimento e pre-catalogazione³⁴ dei materiali scolastici conservati presso n. 7 istituti scolastici delle province di Ascoli Piceno, Fermo e Macerata³⁵.

³³ P. Moeglin, *Les industries éducatives*, Paris, PUF, 2010.

³⁴ L'attività svolta è definita di precatalogazione in quanto – non essendo disponibili schede standardizzate appositamente elaborate per i materiali scolastici dall'Istituto Centrale del Catalogo e della Documentazione (ICCD) – si è deciso di mettere a punto, in collaborazione con il collega Juri Meda, uno strumento flessibile e funzionale alle caratteristiche dell'ampia gamma dei materiali scolastici ma, al contempo, facilmente utilizzabile anche dagli studenti e dai docenti delle scuole interessate. Ogni scheda è completata da una documentazione fotografica ad alta risoluzione: elemento imprescindibile di ogni catalogazione scientifica e, qui, rivelatosi fondamentale per la comparazione dei modelli.

³⁵ L'indagine ha interessato n. 7 istituti scolastici delle province di Ascoli Piceno, Fermo e Macerata ovvero, nello specifico, n. 4 istituti secondari di I grado: la Scuola media dell'Istituto comprensivo Sigismondo Nardi di Porto S. Giorgio; le due scuole medie Betti e Fracassetti di Fermo; la scuola media (ex scuola di avviamento) presso l'Istituto Comprensivo Enrico Mattei di Matelica; e di n. 3 istituti secondari di II grado: l'Istituto Tecnico Industriale Montani di Fermo; il Liceo Classico Statale Annibal Caro di Fermo; l'Istituto Tecnico Agrario Celso Ulpiani di Ascoli Piceno. Le schede sono confluite nelle seguenti tesi di laurea magistrale: E. Bonvecchi, *Le collezioni del costituendo museo dell'Istituto tecnico Montani di Fermo*, Tesi di Laurea Magistrale in Pedagogia del Patrimonio e degli Istituti Culturali (Relatore: Prof.ssa Marta Brunelli), Università degli Studi di Macerata, a.a. 2009-2010; C. Cerretani, *I beni culturali scolastici. Il Liceo Ginnasio Statale*

In particolare i sussidi didattici censiti risalgono principalmente agli anni tra il 1890 e il 1940 e riguardano trasversalmente tutte le discipline, dalla botanica alla fisica, dalla ginnastica all'anatomia ecc. La prospettiva adottata nella rilettura della documentazione catalografica prodotta durante quel primo censimento, ha permesso di studiare i sussidi non soltanto nella loro valenza di testimonianze della storia della scienza o della storia di questa o quella didattica disciplinare, quanto piuttosto nella loro natura di prodotti industriali e oggetti di consumo del nascente mercato scolastico italiano e, dunque, in quanto veri e propri "reperti" dell'industria scolastica. Tale prospettiva ha permesso di evidenziare la non convenzionalità di tali fonti, la quale risiede nel loro essere dei *material object* ovvero:

- oggetti dotati di precise caratteristiche materiali e tecniche frutto di un determinato processo di produzione (di tipo artigianale, semi-artigianale o dichiaratamente industriale), da una parte;
- dall'altra, oggetti caratterizzati ciascuno da una propria biografia individuale risultato delle molteplici traiettorie che – dalla produzione alla distribuzione, all'acquisto, all'uso (scolastico) fino all'obsolescenza e, quindi, alla perdita del loro iniziale valore d'uso – li hanno accompagnati fino a raggiungere la destinazione finale in un museo della scuola o in un gabinetto scientifico scolastico.

Proprio per ricostruire questa "traiettoria biografica" – che nel 2005 lo storico e conservatore scientifico Samuel Alberti ha definito la *objects' biography*³⁶ – è stato messo a punto un protocollo descrittivo finalizzato ad acquisire tutti i dati oggettivi disponibili sulla provenienza e sulla produzione dei sussidi esaminati. Il protocollo prevedeva, oltre all'indicazione della nomenclatura e funzione dell'oggetto, anche una descrizione sintetica ed analitica (delle parti), il riconoscimento dei materiali e delle tecniche di realizzazione, la rilevazione delle varie misure, l'annotazione di marchi e contrassegni commerciali (marchi,

Annibal Caro di Fermo, Tesi di Laurea Magistrale in Pedagogia del Patrimonio e degli Istituti Culturali (Relatore: Prof.ssa Marta Brunelli), Università degli Studi di Macerata, a.a. 2009-2010; J. Fioretti, *Il museo e la scuola: il caso dell'Istituto tecnico G. e M. Montani di Fermo*, Tesi di Laurea Magistrale in Pedagogia del Patrimonio e degli Istituti Culturali (Relatore: Prof.ssa Marta Brunelli), Università degli Studi di Macerata, a.a. 2009-2010; F. Clementi, *L'Istituto comprensivo Enrico Mattei di Matelica. Storia e cultura materiale*, Tesi di Laurea Magistrale in Pedagogia del Patrimonio e degli Istituti Culturali (Relatore: Prof.ssa Marta Brunelli), Università degli Studi di Macerata, a.a. 2011-2012; R. De Angelis, *La catalogazione dei beni culturali materiali della scuola: il caso dell'Istituto Tecnico Agrario Statale Celso Ulpiani*, Tesi di Laurea Magistrale in Pedagogia del Patrimonio e degli Istituti Culturali (relatore: Prof.ssa Marta Brunelli), Università degli Studi di Macerata, a.a. 2011-2012.

³⁶ L'idea della traiettoria biografica deriva dal concetto antropologico di biografia culturale e attiene alla ricostruzione dei cambiamenti di status che caratterizzano la storia degli oggetti che, oggi, compongono le collezioni museali (S.J.M. Alberti, *Objects and the Museum*, «Isis», vol. 96, n. 4, 2005, pp. 559-571).

timbri, etichette ecc.) e, infine, la realizzazione di un'adeguata documentazione fotografica.

Il corpus di oltre 500 schede (con le relative fotografie) permette, oggi, di effettuare una comparazione sistematica tra i vari sussidi, specialmente tra sussidi appartenenti ad alcune tipologie ricorrenti. Il lavoro ha permesso di evidenziare da subito due principali criticità:

- una forte somiglianza tra modelli apparentemente di diversa fattura e/o produzione. Questo fatto ha spesso tratto in inganno i catalogatori (e, probabilmente, anche i compratori dell'epoca) al punto da rendere, oggi, molto difficile l'attribuzione certa a questo o a quel produttore;
- una frequente incongruenza tra oggetti e le etichette apposte su di essi. Talora presenti, talaltra assenti (oppure compresenti in più tipologie ma contrastanti tra loro), proprio la presenza di etichette diverse su sussidi simili ha finito per sollevare dubbi sulla manifattura, sull'effettiva provenienza (italiana o straniera) e sui canali di importazione e distribuzione.

In questi casi si è evidenziata la necessità di integrare le informazioni mancanti o contraddittorie attraverso altre fonti esterne come gli *inventari patrimoniali* degli istituti scolastici (non sempre risolutivi in quanto talora mancanti o spesso riportanti indicazioni minimali), i *carteggi* presenti negli archivi scolastici (purtroppo non sempre accessibili o consultabili), la *legislazione scolastica* coeva relativa ai programmi e ai regolamenti ministeriali sui sussidi scolastici e, infine, i *cataloghi scolastici*.

Come si dimostrerà nel prosieguo del lavoro, in particolare i cataloghi scolastici dimostrano di essere delle fonti insostituibili le quali – se considerate nella loro funzione di veri e propri *repertori* – si rivelano in grado di fornire una serie di informazioni variegata e tutte di grande importanza ovvero:

- immagini (fotografie e/o incisioni) e dimensioni dei sussidi, utili per il confronto diretto con gli esemplari ritrovati;
- indicazioni sull'esatta *nomenclatura* e funzione degli oggetti;
- costi e modalità di spedizione dei materiali, oltre a diverse informazioni aggiuntive relative ai canali di importazione, commercializzazione e produzione dei materiali scolastici in Italia.

La combinazione di questi dati con le informazioni di contesto relative alle case produttrici e alla normativa ministeriale che regolamentava l'uso dei sussidi nella didattica scolastica ordinaria, ci permette – come si vedrà – di ricostruire la complessità del panorama delle industrie scolastiche che nascono e si sviluppano in Italia tra la fine del XIX e la prima metà del XX secolo.

3. *Un caso di studio: i sussidi per l'insegnamento dell'anatomia nella scuola elementare*

Per illustrare la metodologia di lavoro sui cataloghi che ho utilizzato per delineare le principali fasi di sviluppo attraverso le quali prende gradualmente forma in Italia un'industria scolastica nazionale, prenderò qui in esame i risultati derivanti dalla prima analisi dei *sussidi anatomici*. La scelta è caduta su questi oggetti per tre ordini di motivi:

- a. in primo luogo, poiché questi sussidi sono presenti in quasi tutti i gabinetti scientifici osservati e, quindi, sono più facilmente comparabili tra loro;
- b. in secondo luogo poiché rappresentano una delle tipologie di sussidi più costosi dell'epoca i quali, essendo prodotti e destinati a un'ampia gamma di istituzioni educative (dalla scuola primaria fino all'università), erano di conseguenza in grado di muovere importanti scenari industriali e commerciali;
- c. in terzo luogo perché proprio la produzione dei sussidi anatomici di base destinati *in primis* alla scuola elementare sembra aver costituito – tra il 1860 e il 1920 – un fondamentale motore propulsivo alla nascita di un'industria scolastica italiana dedicata a questi materiali.

A proposito di quest'ultimo punto, parlare di “insegnamento dell'anatomia” nella scuola elementare potrebbe sembrare, a prima vista, una forzatura. In realtà, l'insegnamento delle fondamentali nozioni di anatomia nella scuola elementare emerge fin dall'emanazione dei primi programmi per l'insegnamento elementare.

Quando, a partire dal Regio Decreto Legislativo n. 3725 del 13 novembre 1859 del Regno di Sardegna (meglio noto come Legge Casati, nel 1861 estesa a tutto il Regno d'Italia) si afferma in Italia l'istruzione obbligatoria³⁷, il sistema scolastico nazionale appena formatosi ha bisogno di tutto. Oltre agli edifici, agli arredi e alle suppellettili, la scuola ha assoluto bisogno dei sussidi didattici funzionali all'insegnamento di una limitata – ma fondamentale – serie di materie. Tra queste troviamo proprio l'insegnamento delle scienze fisiche e naturali che, già nella declaratoria del testo normativo, chiarisce gli obiettivi e le finalità educative delle materie in oggetto:

Art. 315. L'istruzione elementare è di due gradi, inferiore e superiore. L'istruzione del grado inferiore comprende: l'insegnamento religioso, la lettura, la scrittura, l'aritmetica elementare, la lingua italiana, nozioni elementari sul sistema metrico. L'istruzione superiore comprende,

³⁷ Cfr. M.C. Morandini, *Da Boncompagni a Casati: la costruzione del sistema scolastico nazionale (1848-1861)*, in L. Pazzaglia, R. Sani, *Scuola e società nell'Italia unita. Dalla legge Casati al Centro-Sinistra*, Brescia, La Scuola, pp. 9-46.

oltre lo svolgimento delle materie del grado inferiore: le regole della composizione, la calligrafia, la tenuta dei libri, la geografia elementare l'esposizione dei fatti più notevoli della storia nazionale, *le cognizioni di scienze fisiche e naturali applicabili principalmente agli usi ordinari della vita*³⁸.

Da questo decreto in poi vedremo come il legislatore italiano sottolineerà sempre – e, negli anni, in maniera sempre più incisiva – proprio l'importanza dell'insegnamento di queste «cognizioni di scienze fisiche e naturali applicabili principalmente agli usi ordinari della vita». Ma di quali sussidi c'è bisogno per insegnare queste materie ritenute così necessarie?

Se scorriamo il regolamento attuativo della Legge Casati (*Regolamento delle Scuole elementari del 15 settembre 1860*, Art. 140) noteremo che esso prescrive, in aggiunta alla dotazione minimale dell'aula – dai «banchi di studio con sedili», al «calamaio pel maestro e calamai infissi per gli allievi», e così via fino agli immancabili «crocifisso e ritratto del Re»³⁹ – anche quei pochi sussidi didattici ritenuti indispensabili nella scuola elementare:

Art. 141. [...] la prima classe dovrà avere: 1° I cartelloni per l'insegnamento della lettura conformi al sillabario di cui si servono gli alunni; 2° il pallottoliere.

Art 142. Le classi superiori dovranno avere: 1° Un globo terrestre; 2° Carte per l'insegnamento della geografia, specialmente il Mappamondo e le carte rappresentanti l'Europa e l'Italia; 3° *Tavole rappresentanti oggetti che spettano ai primi elementi delle scienze naturali*; 4° Modelli in rilievo dei principali solidi geometrici⁴⁰.

Dal passaggio citato si evince che, nel 1860, le «tavole» (parietali) sono indicate come i sussidi necessari per l'insegnamento delle *scienze naturali*.

Tra questi «primi elementi delle scienze naturali», ben presto emergerà sempre più esplicitamente l'importanza della conoscenza del corpo umano che – legata all'insegnamento dei precetti igienici di base – diventerà fondamentale già dalle *Istruzioni ai Programmi Gabelli del 1888* (pubblicati con R.D. n.

³⁸ Regio Decreto 13 novembre 1859 sull'ordinamento della Pubblica Istruzione, al Titolo V (*Dell'istruzione elementare*), Capo 1 (*Oggetto ed obbligo dell'insegnamento*), Art. 315. I corsivi sono miei. Sul ruolo delle scienze naturali nella didattica quotidiana della scuola primaria, cfr. F. Bertolino, A. Perazzone, *Le Scienze Naturali nella scuola primaria: antropocentrismo, interdipendenza, identità ecologica nei quaderni valdostani*, in L. Revelli (ed.), *Scritture scolastiche dall'unità ai giorni nostri: studi e ricerche d'area valdostana*, Roma, Aracne editore, 2011, pp. 127-160.

³⁹ Art. 140 del *Regolamento delle Scuole elementari del 15 settembre 1860* (emanato come Regio Decreto 15 settembre 1860 n. 4336, regolamento attuativo della Legge Casati con annessi Programmi della scuola elementare), in: *Codice dell'istruzione secondaria classica e tecnica e della primaria e normale. Raccolta delle leggi, regolamenti, istruzioni ed altri provvedimenti governativi emanati in base alla Legge 13 novembre 1859*, con note spiegate e raffronti colle leggi preesistenti. Approvata dal Ministero della Pubblica Istruzione, Torino, 1861, p. 395. Il corsivo è mio.

⁴⁰ Artt. 141-142 del *Regolamento delle Scuole elementari del 15 settembre 1860*, in *Codice dell'istruzione secondaria classica e tecnica e della primaria e normale...*, cit., pp. 395-396. Il corsivo è mio.

5724, del 25 settembre 1888). La ragione si spiega non tanto, e non solo per la temperie scienziata-positivista in cui quei programmi vengono elaborati, quanto soprattutto per l'assoluta necessità – avvertita dalla classe dirigente della Nazione – di contrastare la «degenerazione fisica del popolo italiano»⁴¹ determinata dalle precarie condizioni igieniche e di salute in cui versavano specialmente le fasce più povere della popolazione. Quella che gli educatori e i pedagogisti si trovano per la prima volta di fronte nelle aule scolastiche è, infatti, un'infanzia non solo largamente analfabeta ma soprattutto gracile, gravemente malnutrita e preda delle malattie più diverse: ai dati allarmanti sui riformati per carenze fisiche e malattie alle leve militari indette fra il 1862 e il 1871 si aggiungono, ancora alla fine degli anni 1880, le descrizioni di «ragazzetti smilzi sciupati da rachitide, agobbiti e col collo e con le gambe storte» o «malaticci e scrofolosi» rappresentati da autori di libri scolastici come Pietro Thouar e Ildebrando Bencivenni⁴².

Porre le basi di un corretto sviluppo psico-fisico dell'infanzia italiana significa, dunque, impostare una corretta educazione igienica, non disgiunta dall'insegnamento dei primi rudimenti dell'anatomia umana: un'educazione specialmente mirata alle classi popolari, che erano le vere destinatarie dell'istruzione elementare, gratuita e obbligatoria della nuova nazione unita. Se ci addentriamo nella lettura di quanto i *Programmi del 1888* prescrivono a proposito della educazione igienica nella scuola elementare, troviamo che il testo prevede:

- per il programma di Italiano della Classe I del corso elementare inferiore, lo studio delle «Parti del Corpo umano» attraverso il metodo dell'«insegnamento oggettivo»⁴³, metodo che sappiamo consistere nell'osservazione, riconoscimento, nomenclatura e descrizione supportata da sussidi visivi;
- per la Classe V del corso elementare superiore, l'approfondimento – nel programma di Fisica e Storia naturale – dei «Principali organi del corpo umano con applicazioni all'igiene»⁴⁴.

Nelle *Istruzioni ai nuovi Programmi per le scuole elementari del 1894* (rinnovati dal Ministro Baccelli con R.D. n. 525 del 3 novembre 1894) i primi rudimenti dell'anatomia sono collocati all'interno delle *Nozioni varie*: definito un «ammaestramento sperimentale» che attinge alla «scienza della vita», l'insegnamento delle nozioni varie deve fornire ai fanciulli lo «schema di cognizioni assolutamente necessarie a chiunque non debba avere altra

⁴¹ G. Bonetta, *Corpo e nazione. L'educazione ginnastica, igienica e sessuale nell'Italia liberale*, Milano, FrancoAngeli, 1990, in partic. pp. 243-275.

⁴² 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, p. 77.

⁴³ Cfr. *I programmi del 1888*, in F.V. Lombardi, *I programmi per la scuola elementare dal 1860 al 1985*, Brescia, La Scuola, 1987, p. 90.

⁴⁴ *Ibid.*, p. 95.

scuola se non quella aperta a tutto il popolo» e che ricomprendono, per tutte le classi, l'insegnamento di nozioni relative al «corpo umano e cure igieniche» e agli «alimenti, vestiario, abitazione e norme igieniche»⁴⁵. Riguardo ai sussidi necessari per questo insegnamento i programmi lasciano in vigore quanto previsto dai precedenti *Programmi Baccelli*: un orientamento che è confermato dal *Regio Decreto 9 ottobre 1895, n. 623, approvante il Regolamento per l'istruzione elementare* che nell'Allegato D (*Arredamento delle scuole e materiale didattico*) dove, in relazione agli «Oggetti e materiale da raccomandarsi per il corso superiore», si riconferma l'obbligatorietà per le scuole elementari di dotarsi genericamente di «Quadri ed oggetti per lo svolgimento del programma delle nozioni varie»⁴⁶.

Con i nuovi *Programmi per le scuole elementari del 1905* (R.D. n. 45 del 29 gennaio 1905) l'insegnamento dell'anatomia umana non solo viene riconfermato tanto nel Corso Inferiore (le prime tre classi) quanto nel Corso Superiore (quarta, quinta e sesta classe) ma viene ulteriormente approfondito con l'introduzione dell'*Igiene* che, per la prima volta, fa la propria comparsa nella scuola elementare come un insegnamento autonomo.

L'applicazione del cosiddetto «metodo ciclico», per cui ogni grado superiore riprende e approfondisce gl'insegnamenti dei gradi inferiori, si svolge dunque secondo un'articolazione degli argomenti ben precisa. In particolare nel Programma della Classe II troviamo, tra le «Lezioni di cose», l'insegnamento delle «Nozioni elementari del corpo umano e dei suoi bisogni»⁴⁷. A tale riguardo le annesse *Istruzioni intorno ai programmi delle scuole elementari* chiariscono, infatti, che:

Non si comincia mai abbastanza presto a dare nozioni, naturalmente elementari, del corpo umano e dei suoi bisogni, fra i quali il maestro darà speciale rilievo alla vicenda del lavoro e del riposo, alla pulizia, alla giusta misura nel mangiare e nel bere, ecc.

Qui s'iniziano le prime norme di igiene, che, riprese con metodo ciclico, si continuano poi per tutto il corso elementare⁴⁸.

Difatti, nei programmi per la Classe III ritornano, stavolta nell'insegnamento «Nozioni varie», il «Corpo umano e norme semplici ed elementari di igiene

⁴⁵ Cfr. *I programmi del 1894*, in Lombardi, *I programmi per la scuola elementare dal 1860 al 1895*, cit., pp. 121-122. Una più dettagliata illustrazione del programma di igiene e di economia domestica riservato alle fanciulle si ritrova nelle *Istruzioni e programmi per l'insegnamento delle prime nozioni di agricoltura, del lavoro manuale educativo, dei lavori donneschi, dell'igiene e dell'economia domestica nelle scuole elementari*. Circolare n. 30. Roma, 28 aprile 1899 (sempre in Lombardi, *I programmi per la scuola elementare dal 1860 al 1895*, cit., in partic. pp. 181-182).

⁴⁶ In «Gazzetta Ufficiale del Regno d'Italia», 18 ottobre 1895, n. 246, pp. 5482-5502, in partic. p. 5502.

⁴⁷ Cfr. *I programmi del 1905*, in Lombardi, *I programmi per la scuola elementare dal 1860 al 1895*, cit., p. 190.

⁴⁸ *Ibid.*, p. 246.

personale, domestica e pubblica»⁴⁹: argomenti che, nella Classe IV, verranno approfonditi attraverso la «Ripetizione e ampliamento delle nozioni impartite nella terza classe»⁵⁰. Le *Istruzioni* chiariscono in vhe modo le basilari nozioni di anatomia umana vadano impartite dal maestro in funzione delle finalità e degli obiettivi dell'educazione igienica:

Del corpo umano non si saranno date nella seconda classe che nozioni sommarissime, limitate forse soltanto alla nomenclatura delle sue varie parti. Nella terza e nella quarta classe si può già dire delle sue principali funzioni. Facendo osservare le pulsazioni del cuore e delle arterie in varie parti del corpo, il maestro può accennare alla circolazione del sangue; facendo osservare la dilatazione del torace nella respirazione, parlerà di questa vitale funzione; prendendo le mosse dalla refezione fatta in scuola, dirà della digestione e delle sue condizioni necessarie.

Questa indagine sulle funzioni dell'organismo deve essere sempre accompagnata da norme semplici ed elementari d'igiene, che prendono qui il posto dei cenni sui bisogni del corpo, dati nella seconda classe. Così parlando della circolazione del sangue il maestro può mettere questo fenomeno in rapporto colla respirazione e colla nutrizione, e dire della necessità di mantenere il sangue vivo, agile, ricco di elementi nutritivi. È questo il momento in cui egli può diffondersi sui cibi, sulle loro proprietà, sul modo di prepararli e d'ingerirli, sulle ore dei pasti, sulla temperatura delle vivande, sulle proporzioni tra il mangiare ed il bere, sul divieto degli eccessi, sui vantaggi della sobrietà, sui danni dell'alcoolismo e così via. Egli può ampliare la nozione di respirazione parlando della respirazione generale per via della pelle. E qui può dire della necessità della pulizia, dei bagni generali e parziali, del pettinarsi, e poi aggiungere qualche cosa del vestiario, dello spessore degli abiti, della necessità e del modo di spolverarli, etc.

Si comprende che gli sviluppi di questi insegnamenti variano, e debbono variare, a seconda che si tratti di classe maschile o femminile. Specialmente l'igiene domestica sarà trattata, sebbene ancora nei termini più elementari, a preferenza nelle classi femminili; ma tutti debbono pur sapere della necessità di spazzare e lavare stanze, di spolverare la mobilia e di aerare la casa⁵¹.

Come si vede, la trasmissione dei primi rudimenti di anatomia è indissolubilmente legata alla necessità di preparare i giovani allievi a ricevere con maggiore consapevolezza l'insegnamento dell'igiene, che non deve restare un insieme di nozioni teoriche ma deve dare come esito l'adozione di corrette condotte igieniche funzionali a «proteggersi da malattie infettive» come la tisi, il tifo, la pellagra o la malaria⁵², all'epoca endemiche tra le classi popolari. Ancora nelle *Istruzioni* si sottolinea, infatti, che «L'igiene confina infatti con la medicina, di cui alcuni elementi, accessibili al popolo e per esso più specialmente utili, saranno svolti nella sesta classe»⁵³. Ecco che, arrivati alle ultime due classi V

⁴⁹ *Ibid.*, p. 191.

⁵⁰ *Ibid.*, p. 192.

⁵¹ *Ibid.*, p. 247.

⁵² *Ibid.*, p. 248.

⁵³ *Ibid.*, pp. 272-273.

e VI (il cosiddetto “corso popolare”), gli allievi affrontano lo studio della nuova materia scolastica dell’*Igiene* che prevede l’approfondimento dell’anatomia in funzione dell’apprendimento, in VI classe, delle «Norme elementari e pratiche di profilassi contro le principali malattie infettive – Soccorsi d’urgenza», per le classi maschili, e dello «Lo stesso programma aggiungendovi le norme generali per assistere gl’infermi e coadiuvare il medico», per le scuole femminili⁵⁴.

Arrivati a questo punto del corso elementare, le *Istruzioni* offrono indicazioni più specifiche non solo sui contenuti dell’insegnamento dell’*Igiene* ma anche sull’utilizzo dei sussidi più adeguati a tale scopo:

Igiene. L’ultimo capitolo di un corso di zoologia, elementare quanto si voglia, è la somatologia. Da questa deve muovere l’insegnamento d’igiene. Per far meglio comprendere la struttura del corpo umano, il maestro si potrà servire di *comuni carte anatomiche parietali*, di cui anche le scuole meno dotate dovrebbero essere in ogni caso fornite. *Quelle meglio provviste potrebbero possedere dei modelli in carta pesta*⁵⁵.

L’insegnamento anatomico-igienico *nella scuola elementare e popolare* assume dunque un valore strategico nelle politiche educative dello Stato centrale, che vede crescere tra pedagogisti e medici igienisti il dibattito sull’importanza della scuola come avamposto per la lotta al degrado culturale e igienico delle masse popolari. Non va dimenticato, peraltro, che lo Stato italiano nel 1904 – con la *Legge Orlando* (Legge N. 407 dell’8 luglio 1904) – aveva per l’appunto elevato l’obbligo scolastico sino ai 12 anni attraverso l’istituzione della classe V e VI del Corso popolare. Il corpo insegnante si trovava perciò investito di un ruolo educativo che diviene ancora più strategico e, per di più, approfondito ed esteso fino alle ultime classi.

E difatti, proprio a cavallo tra la fine dell’Ottocento fino ai primi decenni del Novecento, il ruolo della scuola elementare e popolare diventò l’oggetto di un importante dibattito che coinvolse gli igienisti dell’epoca assieme ad un’intera generazione di pedagogisti positivisti. Come conseguenza, tale dibattito vide fiorire un’importante letteratura igienico-educativa, assieme alla nascita di diverse riviste specializzate proprio su questi temi: come *Igiene e scuola: periodico mensile di igiene familiare e pedagogia* (Mantova, Tip. degli operai, 1892), *l’Igiene dell’infanzia e medicina preventiva: periodico dedicato alle famiglie, alle scuole ed ai medici pratici* (Roma, Tip. Coop. Romana, 1892-1896) o *L’igiene infantile: monitore delle madri e degli istituti nazionali a pro dell’infanzia* (Venezia, Segrè, [1878]-1884).

Proprio per supportare i maestri in questa delicata missione igienico-educativa nella scuola la normativa scolastica segnala quali sono i sussidi indispensabili: li troviamo nell’*Allegato D del Regolamento Generale per l’istruzione Elementare*

⁵⁴ Cfr. *I programmi del 1905, ibid.*, p. 195.

⁵⁵ *Ibid.*, p. 270. I corsivi sono miei.

approvato con R. Decreto 6 febbraio 1908. N. 150, nel quale vengono indicate – relativamente all'insegnamento delle nozioni di anatomia/igiene – le seguenti dotazioni:

- come *Materiale didattico obbligatorio per il corso inferiore (1a, 2a e 3a)*, una «Tavola rappresentante l'interno del torace e dell'addome dell'uomo (polmoni, cuore, intestino»;
- e come *Materiale didattico obbligatorio per il corso superiore (4a, 5a e 6a)*, «Tavole rappresentanti il corpo umano (muscoli, vasi sanguigni, sistema nervoso)»⁵⁶.

Riassumendo quanto emerso dai programmi per la scuola elementare, a partire dal 1860 le scuole italiane si trovano di fronte alla necessità di acquistare pochi, ma specifici, sussidi che – per l'insegnamento dell'igiene – consistono inizialmente in *quadri* ovvero *tavole anatomiche parietali* e, successivamente, anche in *modelli in carta pesta*. Ma le ditte italiane sono in grado di soddisfare la domanda del nuovo mercato scolastico? E cosa ci dicono a tale riguardo i cataloghi commerciali?

4. *La richiesta dei sussidi anatomici e i produttori italiani: le carte murali*

Come abbiamo visto, i sussidi didattici previsti per l'insegnamento dell'anatomia nella scuola primaria consistono in due principali tipologie: quadri e oggetti ovvero, rispettivamente «carte anatomiche parietali», che nel 1908 diventano materiali didattici obbligatori, e i «modelli in cartapesta» ovvero modelli anatomici tridimensionali che le *Istruzioni* ai Programmi del 1905 non impongono bensì suggeriscono di acquistare, soprattutto a quelle scuole che siano «meglio provviste» di mezzi economici. I tempi mettono non solo la scuola ma anche la nascente industria scolastica italiana di fronte ad una sfida inedita: fino a che punto, infatti, i produttori italiani di materiali scolastici sono in grado, a cavallo tra la fine del XIX e gli inizi del XX secolo, di produrre e commercializzare questi materiali?

Nel caso delle carte anatomiche parietali la produzione interna poteva più facilmente rispondere a questa nuova esigenza del mercato scolastico. All'indomani dell'unificazione, infatti, l'unica, vera industria scolastica era costituita da una rete di tipografie e librerie-editrici che già disponevano delle

⁵⁶ *Regolamento Generale per l'istruzione Elementare approvato con R. Decreto n. 150 del 6 febbraio 1908 – Materiale Didattico indicato nell'Allegato D* (in «Gazzetta Ufficiale», n. 111 dell'11 maggio 1908, e in «Bollettino ufficiale» n. 21 del 21 maggio 1908). L'Allegato D è integralmente riprodotto nel *Catalogo del Materiale Scolastico per gli asili infantili e le scuole elementari. Anno scolastico 1910-1911*, Torino, Paravia, 1911, pp. 1-2 (Collezione Museo della Scuola Paolo e Ornella Ricca, Università di Macerata).

infrastrutture produttive e commerciali in grado di fronteggiare la richiesta di nuovi materiali scolastici di tipo cartaceo. È questo il momento in cui realtà più antiche e già affermate, come la Paravia di Torino o la Vallardi di Milano, la Sandron di Napoli, la Bemporad di Firenze (erede della libreria editrice dei fratelli Paggi), come anche altre altre case editrici di recente costituzione, come ad esempio la Trevisini di Milano (che nasce nel 1859 come casa editrice dai fini dichiaratamente educativi), decidono di specializzarsi proprio in quello che promettono di affermarsi come il fiorentino mercato interno delle scuole italiane⁵⁷.

Con l'unificazione e con la nascita di un sistema scolastico nazionale si assiste, pertanto, al fiorire di una ricca produzione italiana di sussidi cartacei facilmente realizzabili con le già disponibili infrastrutture tipografiche, ovvero: cartelloni di sillabazione, quadri di nomenclatura figurata, carte geografiche, atlanti, globi terrestri e quadri murali per l'insegnamento delle varie discipline.

Tra questi sussidi cartacei troviamo, appunto, quelli specificamente destinati all'insegnamento anatomico come le tavole anatomiche murali, per la realizzazione delle quali i produttori italiani avviano collaborazioni con medici, docenti e primari esperti di anatomia, da una parte. Dall'altra, gli stessi produttori si attrezzano per intraprendere la fabbricazione di sussidi innovativi che possano competere con i materiali scolastici stranieri ben più evoluti (in particolare francesi e tedeschi) che, osservati all'estero durante le esposizioni didattiche, non di rado vengono copiati e riprodotti (nei cataloghi leggiamo «tradotti») senza tanti scrupoli.

Un esempio di come le prime politiche produttive si sviluppino tra la fine dell'800 e i primi decenni del '900 lo si evince confrontando l'evoluzione dei prodotti commercializzati in quegli anni dalla casa editrice torinese Paravia che, assieme alla casa Vallardi, fu tra le più attive nella realizzazione di sussidi anatomici per la scuola elementare.

Dal *Catalogo Paravia del materiale scolastico* dell'ottobre 1891 vediamo che la casa torinese presenta al suo pubblico un'interessante produzione di sussidi anatomici di natura tipografica, consistenti in:

⁵⁷ Per un primo orientamento sul panorama editoriale scolastico cfr. G. Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, Brescia, La Scuola, 2000; Id., *Il libro per la scuola tra Otto e Novecento*, in *Teseo. Tipografi e editori scolastico-educativi dell'Ottocento*, cit., pp. XVII-XVIII; R. Sani, *L'editoria scolastico-educativa nell'Italia meridionale dell'Ottocento*, in Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, cit., pp. 225-275; C. Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento. La tradizione toscana e le nuove realtà del primo Novecento in Italia*, Firenze, Pagnini, 2004; Sani, *L'editoria educativo-scolastica cattolica tra le due guerre*, in Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento*, cit., pp. 265-278; M. Galfré, *Il regime degli editori. Libri, scuola e fascismo*, Roma-Bari, Laterza, 2005; C.I. Salviati (ed.), *Paggi e Bemporad editori per la scuola. Libri per leggere scrivere far di conto*, Firenze, Giunti, 2007; F. Targhetta, *La capitale dell'impero di carta. Editori per la scuola a Torino nella prima metà del Novecento*, Torino, SEI, 2007; E. Marazzi, *Libri per diventare italiani. L'editoria per la scuola a Milano nel secondo Ottocento*, Milano, FrancoAngeli, 2014.

- tavole anatomiche murali: le tavole dal titolo *Le parti del corpo umano per l'insegnamento elementare dell'antropologia e dell'igiene* («Rappresentate con disegni schematici dal Prof. T[ommaso] Fab[b]ro. Quattro grandi tavole colorate, specialmente dedicate alle scuole elementari, normali e secondarie in base ai recenti programmi governativi; con fascicolo di testo spiegativo», disponibili sia «sciolte» che «montate su tela»; Pic. 1a-b), e le *Tavole murali di anatomia umana (Fiedler)* («Quattro grandi fogli diligentemente stampati a colori, con un fascicolo spiegativo italiano-latino», disponibili anche «montate su tela con bastoni». Pic. 1b);
- manuali per l'insegnamento di anatomia e igiene, come il più volte ristampato volume di Tommaso Fabbro e Felice Marco (*Nozioni di storia naturale e fisica per le scuole elementari superiori*)⁵⁸ e quello curato da Angelo Fava (*Prime nozioni di antropologia fisica e di igiene*)⁵⁹.

Nel testo del catalogo del 1891, la Paravia illustra le motivazioni che hanno portato alla realizzazione di questi nuovi sussidi e, in particolare, delle Tavole del Fabbro:

In Italia, come in tutti gli altri Stati che godono di un ben ordinato corsi di studi, l'insegnamento della struttura del corpo umano è, da parecchi anni, entrato nei programmi, non solamente degli istituti superiori, ma ben anco delle scuole tecniche, normali od elementari. Per queste ultime però mancava finora una collezione di ben appropriate Tavole anatomiche murali, essendo quelle esistenti troppo zeppe di minuti ed ingombranti particolari. Ed è appunto per riparare a questo sentito bisogno, che abbiamo ora pubblicato le suddette Quattro tavole schematiche, nella preparazione delle quali avemmo speciale riguardo a due cose, cioè:

1° Che non contenessero più di quanto è compatibile coll'intelligenza dei giovani scolari;
 2° Che le figure fossero semplici nei contorni, chiare e precise nel disegno e nella coloritura. Tali esigenze non si potevano altrimenti raggiungere se non semplificando le figure mediante una ben ideata riproduzione schematica. È bensì vero che le figure così ottenute non corrispondono con matematica esattezza alla realtà, ma ciò è largamente compensato

⁵⁸ Come risulta dalla banca-dati italiana sui libri scolastici EDISCO <<http://www.edisco.unito.it/>> e dal catalogo del Servizio Bibliotecario Nazionale SBN <<http://opac.sbn.it/>> questo trattato è apparso in prima edizione nel 1889 come risposta ai Programmi Gabelli (T. Fabbro, F. Marco, *Nozioni di storia naturale e fisica per le scuole elementari superiori, compilate sui programmi 25 settembre 1888*, Torino, Stamp. Reale Della Ditta G.B. Paravia e C., 1889) ma è stato negli anni successivi più volte ristampato in diverse edizioni (sia compendiate che ampliate e in più volumi) almeno fino al 1920.

⁵⁹ Anche questo volume viene più volte rieditato da Paravia a partire dal 1854 fino al 1875 (stando alle banche-dati EDISCO e SBN) e, ancora, fino al 1891, come apprendiamo dal catalogo Paravia in oggetto. Angelo Fava ha collaborato anche alla traduzione dal tedesco del fortunato manuale scolastico per le scuole superiori *Das Buch der Natur* di Friedrich Schoedler del 1846 (*Il libro della natura. Lezioni elementari di fisica, astronomia, chimica, mineralogia, geologia, botanica, fisiologia, zoologia, per uso dei cultori delle scienze naturali ed utili soprattutto agli alunni delle scuole secondarie e agli istituti tecnici*, Torino, Unione Tipografico-Editrice, 1865 e 1867).

dall'apprezzabile vantaggio di avere delle Tavole veramente adatte all'intelligenza dei giovanetti, nei quali esse lasciano una sicura e durevole impressione delle cose viste ed udite. Alle Tavole va unito un fascicolo di testo, il quale dà brevi spiegazioni delle singole parti, che nelle figure sono contrassegnate con piccole cifre⁶⁰.

Per fronteggiare l'innovazione didattica introdotta dai programmi per la scuola elementare a partire dal 1888 (e ancor più nei successivi del 1895 e del 1905), la casa italiana risponde realizzando direttamente i nuovi sussidi cartacei: o avvalendosi del contributo originale di specialisti italiani (come nel caso delle Tavole del Prof. Tommaso Fabbro) oppure riproducendo materiali didattici di produzione tedesca, come i *Fogli* del Dottor Alfred Fiedler (professore presso l'Università di Dresda e autore di famosi manuali e *Wandtafeln* per la scuola)⁶¹, corredandoli della nomenclatura anatomica italiana al fine di rendere i materiali utilizzabili nelle scuole della penisola («Ogni organo è poi indicato con una lineetta corrispondente al nome anatomico italiano»)⁶².

Questa politica produttiva è riconfermata anche nei cataloghi successivi del 1902 e del 1910 dove – accanto a opere originali prodotte da collaboratori italiani come il Dott. Dante Bocci (primario del Reparto di Oculistica dell'Ospedale di Novara e anatomista) e il Dott. Enrico Villa (primario del Manicomio di Imola)⁶³ – ritroviamo, ancora una volta, diverse pubblicazioni e sussidi tipografici riprodotti da originali stranieri. Tra questi spicca, in particolare, una serie di sussidi innovativi (non presenti nel catalogo 1891) che costituiscono un esempio emblematico di come le case italiane innovassero la propria produzione attingendo direttamente alle novità prodotte dalle industrie scolastiche straniere, sia tedesche che britanniche.

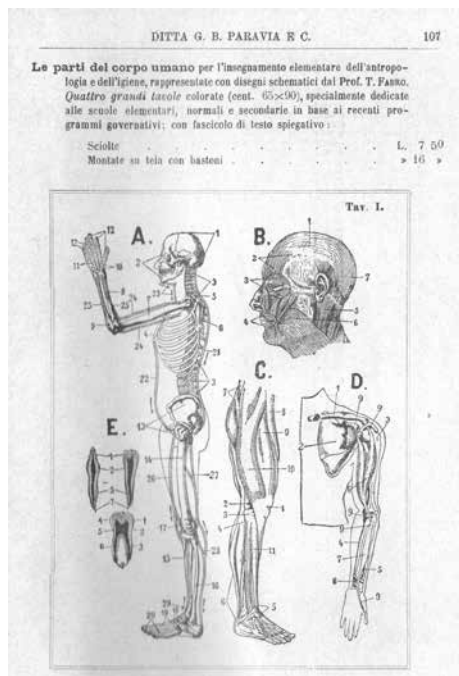
Mi riferisco alle cosiddette «tavole anatomiche clastiche» che ritroviamo nei cataloghi Paravia del 1902 (*Pics. 2.a-b*), del 1910 e del 1916-17. Con

⁶⁰ *Catalogo della ditta G.B. Paravia e C. Materiale scolastico. Anno scolastico 1891-92*, Torino-Roma-Milano-Firenze-Napoli, Ottobre 1891, pp. 107-108. Il grassetto è nel testo originale.

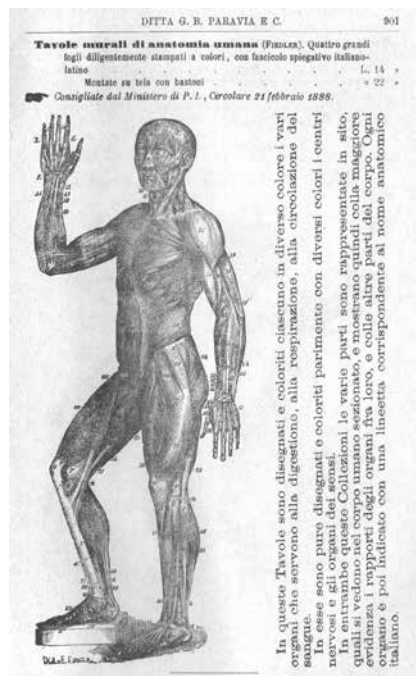
⁶¹ La sua opera *Der Bau des menschlichen Körpers* [La struttura del corpo umano] fu pubblicata sia sotto forma di Tavole murali all'interno dell'*Anatomischer Wandatlas zum Schulunterricht* [Atlante murale anatomico per le lezioni universitarie] (4. ed., Dresden, [s.n.], 1874) sia all'interno di manuali scolastici, pubblicati in diverse edizioni tra il 1880 e gli anni 1910: A. Fiedler, J. Blochwitz, *Der Bau des menschlichen Körpers. Leitfaden für den Schulunterricht* [La costruzione del corpo umano. Guida per l'insegnamento scolastico], Dresda, Meinhold, 1883; A. Fiedler, *Der Bau des menschlichen Körpers. Für die Hand des Lehrers* [Manuale ad uso dei maestri], Dresden, Meinhold & Söhne, 1903-1917; A. Fiedler, E. Hoelemann, *Der Bau des menschlichen Körpers. Kurzgefaßte Anatomie mit physiologischen Erläuterungen für den Schulunterricht* [Breve anatomia con spiegazioni fisiologiche per le lezioni scolastiche], 10^a ed., Dresden, Meinhold und sons, 1917).

⁶² *Catalogo della ditta G.B. Paravia e C. Materiale scolastico. Anno scolastico 1891-92*, Torino-Roma-Milano-Firenze-Napoli, Ottobre 1891, p. 10[9].

⁶³ Nei cataloghi sono pubblicizzati anche i manuali per l'uso scolastico del Dottor Bocci (*Igiene degli occhi dal lato scolastico*, Torino, Paravia 1897) e del Dott. Villa (*Il corpo umano, sue funzioni e suoi bisogni. Nozioni pratiche di anatomia, fisiologia e igiene per uso specialmente delle scuole normali*, Torino, Paravia 1893. Questo testo risulta ristampato fino al 1910).



Pic. 1a. *Le parti del corpo umano per l'insegnamento elementare dell'antropologia e dell'igiene*. Tavole di Tommaso Fabbro.



Pic. 1b. *Tavole murali di anatomia umana (Fiedler)*. Quattro grandi fogli diligentemente stampati a colori.

l'espressione *tavole clastiche* sono indicate alcune illustrazioni (presentate sotto forma di tavole murali o di fogli sciolti, ma anche di volumetti a stampa) costruite sovrapponendo tra loro vari elementi cartacei mobili: una sorta di alette scomponibili che, sollevandosi o aprendosi (come veri e propri meccanismi *pop up*), rivelano altre immagini sottostanti e forme tridimensionali su più livelli⁶⁴. Nel corso del XIX secolo questa tecnologia tipografica viene ampiamente utilizzata dalle industrie nordeuropee per la realizzazione di libri e sussidi scolastici di cui la Paravia, dopo il 1890, propone prontamente una

⁶⁴ Queste immagini appartengono in realtà a una lunghissima tradizione nell'illustrazione anatomica, quella dei cosiddetti *anatomical flap books* in cui si collocano sia volumi prestigiosi come il *De humana corporis fabrica* di Andrea Vesalio (Basilea, 1543) sia i primi fogli volanti *pop up* di anatomia, gli *anatomical fugitive sheets* risalenti addirittura alla prima metà del '500 (A. Carlino, *Paper bodies: a catalogue of anatomical fugitive sheets 1538-1687*, London, Wellcome Institute for the History of Medicine, 1999). Su questo tema si veda la mostra online *Animated Anatomies*, curated by V. Finucci and M. Ripa-Bonati with the assistance of R. Ingold and M. Brown, Duke University, Durham (NC), 6 April-18 July 2011 <<http://exhibits.library.duke.edu/exhibits/show/anatomy>> (ultimo accesso 16.07.2018).

propria edizione italiana. Nel Catalogo del 1902⁶⁵ troviamo ben cinque prodotti “clastici” ovvero:

- M[ario] Lessona, *Struttura del corpo umano*. Cinque figure clastiche (scomponibili) stampate a colori, e testo esplicativo riferentesi a numeri stampati sui disegni (Pic. 2.a);
- E[nrico] Villa, *Il corpo umano, sue funzioni e suoi bisogni*. Nozioni pratiche di anatomia, di fisiologia e d'igiene, con illustrazioni intercalate nel testo e figure clastiche dell'uomo, del Dott. G. Schmidt (Torino, Paravia, 1893; 1896)⁶⁶;
- Dott. F. Schmidt, *Anatomia della testa dell'uomo spiegata con tavole clastiche*. Traduzione italiana con note ed aggiunte del dott. D. Bocci (Pic. 2.b);
- Dr. H[ermann] Renlow, *Anatomia dell'occhio umano e dei suoi annessi*. Descritta su una serie di tavole colorate. Traduzione italiana con molte note ed aggiunte del dott. D. Bocci (Torino, Paravia, 1897)⁶⁷;
- Dr. L[orenzo] Scofone, *La mano ed il piede. Descrizione anatomica, con l'aggiunta di nozioni di fisiologia ed igiene* (Torino, Paravia, 1900).

Benché solo tre dei prodotti commercializzati siano dichiarati come traduzioni di opere straniere, in realtà anche l'opuscolo clastico curato da Michele Lessona (Pic. 2.a) – che a cavallo tra la fine del '800 e gli inizi del '900 compare sia per i tipi dalla milanese Vallardi⁶⁸ che della torinese Paravia (la quale lo pubblicherà ininterrottamente fino agli anni '30)⁶⁹ – risulta essere

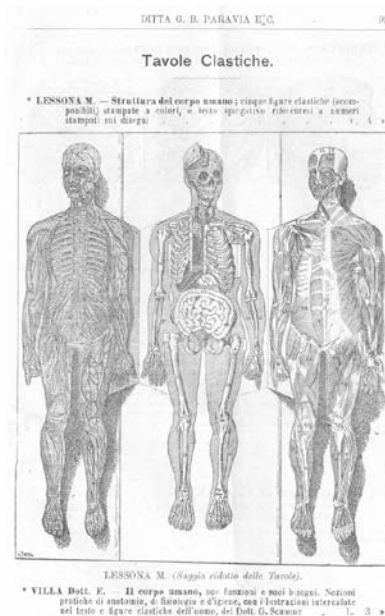
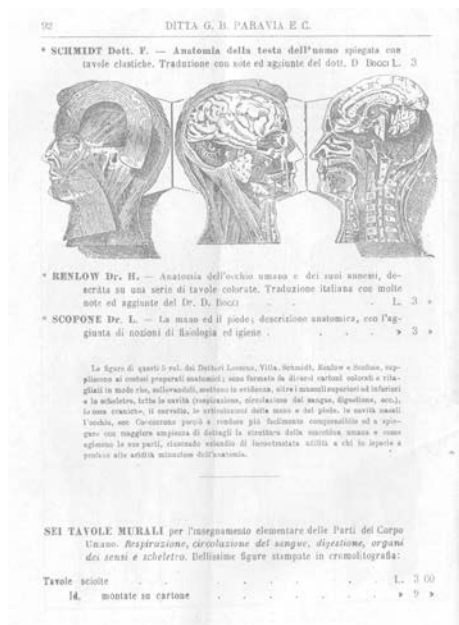
⁶⁵ Catalogo della ditta G.B. Paravia e C. Materiale scolastico per arredamento degli asili infantili e delle scuole elementari, Torino, Paravia, Novembre 1902, pp. 91-92. Cfr. anche il Catalogo del materiale scolastico per gli asili infantili e le scuole elementari. Anno scolastico 1910-1911, Torino, Ditta G.B. Paravia, [1910] (pp. 70-71); e il Catalogo Num. 1.: Materiale scolastico per gli asili infantili e le scuole elementari, Torino, Ditta G.B. Paravia & C., Anno scolastico 1916-17, pp. 114-115.

⁶⁶ Traduzione italiana dell'opera: Dr. Schmidt, *Der menschliche Körper. Anschauliche Darstellung seines Baues und seine Organe*, Fürth (Bayern), Löwensohn [1893].

⁶⁷ Traduzione italiana dell'opera: H. Renlow, *Das menschliche Auge und seine Hilfsorgane: anatomisch dargestellt und mit erläuterndem Text*, Fürth, Löwensohn, [1896]. L'opera apparve tradotta in numerosi paesi: oltre che in Italia già in Inghilterra (H. Renlow, *The Human Eye and its auxiliary organs, anatomically represented, with explanatory text*, Revised and edited, with an introduction on eyesight by J. Browning, London, G. Philip & Son, 1896), Spagna (due diverse edizioni: H. Renlow, *El ojo humano y sus órganos auxiliares*, Traducción directa del Alemán por el Dr. D. Rafael del Valle y Aldabalde, Madrid, Librería Editorial de Bailly-Baillière é Hijos, [s.d.]; Id., *El ojo humano y sus órganos auxiliares: representación anatómica y texto explicativo*, Tetuan de Chamartin [s.n., s.d.]) e Svezia (H. Renlow, *Menniskoögat med biorgan. Anatomisk framställning med förklarande text*, Stockholm, Chelius, 1896).

⁶⁸ Di quest'opuscolo è attestata un'altra edizione italiana, stavolta della casa Vallardi: M. Lessona, *Struttura del corpo umano. Testo esplicativo del prof. Mario Lessona*, Milano, Vallardi, [1890].

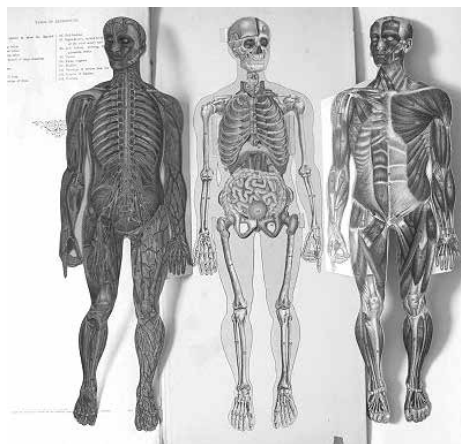
⁶⁹ Una prima edizione torinese, risalente agli anni 1890-1900, è conservata presso la Wellcome Library di Londra (M. Lessona, *Struttura del corpo umano*, Torino, G.B. Paravia, [ca. 1890]) mentre l'ultima attestata è del 1934 (M. Lessona, *Struttura del corpo umano. [Il corpo dell'uomo. Testo esplicativo. Modelli plastici di Anatomia umana ideati dal Dott. R. Fusari ed eseguiti dal Dott. A.C. Bruni]*, Torino, G.B. Paravia & C., 1934).



Pics. 2a-b. Da: *Catalogo della ditta G.B. Paravia e C.ia. Materiale scolastico per arredamento degli asili infantili e delle scuole elementari*, Torino, Paravia, Novembre 1902, pp. 91-92. (Museo della Scuola, Macerata).

la versione italiana di un famoso opuscolo anatomico, anch'esso ripiegabile e scomponibile, realizzato intorno al 1893 dalla casa editrice londinese George Philip & Son con il titolo *Philip's Popular Manikin or model of the Human Body* (Pic. 2.c). Pubblicato ininterrottamente e con poche variazioni fino al 1958, questo opuscolo inaugurò il filone dei *manikins* che ebbero grande successo in Inghilterra, Germania, Francia e Stati Uniti⁷⁰ e che l'editore italiano ebbe sicuramente modo di osservare nelle varie Esposizioni universali e didattiche dell'epoca. È noto, infatti, che già Innocenzo Vigliardi Paravia intorno agli anni 1880 aveva deciso di inviare il primogenito Carlo all'estero ad «accertare *de visu* quali cose potevano essere riprodotte e subito adattate al nostro ambiente, quali altre dovevano essere dapprima importate per tentarne col tempo l'imitazione

⁷⁰ Altri opuscoli noti sono il *Baillière's Popular Manikin* (London, Baillière, Tindall & Cox, [1900]), il *Whites' Physiological manikin* (New York, James T. White & Co., c1886), il *Dr. Minder's Anatomical Manikin of the Human Body*. Revised Edition (New York, American Thermo-Ware Co. Publishers & Importers, 1900) e altri ancora. Cfr. S. Schleper, *Philips' Popular Manikin: Public Anatomy and Gender Stereotypes around 1900*, October 6, 2013, <<https://shellsandpebbles.wordpress.com/>>; Ead., *Knife-less Dissection: Functions of fold-outs in 19th century anatomical culture*, January 12, 2014, <<https://shellsandpebbles.wordpress.com/>> (ultimo accesso: 10.07.2018).



Pic. 2c. Philips' Popular Mannikin or Model of the Human Body, Edited by W.S. Furneaux, London, George Philip & Son, [1900]. (Collezione privata dell'autrice).

riproducibili in serie e, per questo motivo, meno costosi e più solidi delle ceroplastiche anatomiche. Grazie a questa tecnica innovativa⁷³ la produzione di Auzoux conquistò presto il mercato ottocentesco dei sussidi destinati alle università, alle accademie e alle scuole di tutto il mondo, rivoluzionando l'insegnamento dell'anatomia e delle scienze naturali con i propri modelli clastici di anatomia, zoologia e botanica. Con l'adozione dell'aggettivo *clastico* dunque, la casa italiana adotta un preciso stratagemma commerciale che vuole rievocare l'eccellenza della produzione francese di modelli anatomici tridimensionali: rinomati in tutto il mondo, costosissimi ma ugualmente richiestissimi anche dalle scuole italiane, specialmente superiori (come dimostrano, per esempio, l'acquisto del famoso «oeil de l'Homme» di Auzoux da parte del Liceo di Novara nel 1874 documentato nel carteggio degli archivi Auzoux⁷⁴, o la presenza di questo sussidio presso le collezioni anatomiche del Liceo Classico di Fermo)⁷⁵. D'altro canto, è la stessa Paravia a rivelare – sempre nel catalogo del

e la produzione nel nostro stato»⁷¹. È pertanto del tutto plausibile che questi innovativi sussidi anatomici rientrassero nella stessa politica della casa Paravia.

Ma la comunicazione pubblicitaria che la Paravia utilizza per presentare alle scuole italiane questi prodotti innovativi è mirata e rivelatrice di precise scelte produttive e commerciali.

A livello implicito, il linguaggio adottato non è casuale ma mirato: l'espressione «tavole clastiche» è infatti un riferimento diretto a un neologismo creato dall'anatomista parigino Louis Thomas Jérôme Auzoux il quale coniò l'aggettivo *clastique*⁷² per indicare i propri modelli anatomici scomponibili in cartapesta, dipinti a mano ma

⁷¹ E. Baratelli, *Il materiale scolastico creato da Innocenzo Vigliardi-Paravia*, «Paraviana», vol. 2, n. 4, aprile 1922, pp. 86-87.

⁷² Derivante dal gr. κλάω (*kláo*): «rompo» e κλαστός (*klastòs*): «frammentato in pezzi».

⁷³ Sulla tecnica di realizzazione dei modelli clastici cfr. G. Ruiz, C. Degueurce, *Les modèles d'anatomie clastique du docteur Auzoux au Musée de l'École Vétérinaire d'Alfort*, «Bulletin de la Société Française d'Histoire de la Médecine et des Sciences Vétérinaires», n. 9, 2009, pp. 35-49.

⁷⁴ Tra le esportazioni all'estero documentate dal carteggio della casa Auzoux (Fonds Montaudon, Archives nationales 242 AP/1) figura un «OEil complet» inviato al Liceo di Novara nel 1874 (N. Chanal, *L'anatomie clastique de Louis Auzoux: une entreprise au XIX^e siècle*, Thèse de doctorat de médecine vétérinaire, École nationale vétérinaire d'Alfort, 2014, p. 70).

⁷⁵ Presso il liceo classico «Annibal Caro» di Fermo è presente ancora oggi un occhio anatomico

1902 – che le ragioni commerciali che l'hanno indotta a produrre queste tavole clastiche è che esse «suppliscono ai costosi preparati anatomici» di natura tridimensionale⁷⁶.

In sintesi, il richiamo (esplicito) ai *modèles d'anatomie clastique* del Dottor Auzoux, come anche il collegamento (implicito) ai *manikin* anglosassoni, evidenziano il ruolo di minorità rispetto alle più progredite industrie straniere in cui si trovavano i nuovi produttori italiani che iniziavano, appena allora ad affacciarsi su una realtà produttiva e commerciale per loro del tutto nuova. Ma un settore in particolare, agli inizi del '900, continuava a rappresentare il vero punto debole della nascente industria scolastica nostrana: quello della produzione dei modelli didattici tridimensionali.

5. La richiesta dei sussidi anatomici e i produttori italiani: i modelli tridimensionali

Notoriamente l'Italia è considerata la patria di un'importante tradizione di ceroplastica anatomica che, fin dal '600, attraverso figure di modellatori insigni e delle loro produzioni in cera colorata – dal ceroplasta siciliano Gaetano Giulio Zumbo, ai bolognesi Ercole Lelli, il suo allievo Giovanni Manzolini e sua moglie Anna Morandi, fino alla Officina ceroplastica fiorentina creata da Felice Fontana nel 1771 ecc. – ha goduto di un incontrastato prestigio internazionale, soprattutto nell'ambito della ricerca scientifica e della didattica universitaria⁷⁷. Ma cosa ben diversa era dare vita a una massiccia produzione di modelli anatomici che, per la prima volta destinati ad una scuola di massa, esigevano precise caratteristiche: di essere sì scientificamente corretti ma non particolarmente sofisticati, allo stesso tempo resistenti e, soprattutto, economici. Qualità, queste, che potevano essere garantite solo da prodotti realizzati in serie attraverso procedimenti standardizzati e di natura industriale.

Simili sussidi necessitavano di un'apposita tecnologia, di laboratori dedicati, infine di maestranze specializzate e assistite da scienziati anatomisti capaci di

in cartapesta policroma datato 1866 e firmato dallo stesso Auzoux (*fecit* 1866), come era sua abitudine.

⁷⁶ Catalogo della ditta G.B. Paravia, 1902, cit., p. 92.

⁷⁷ Sulla ceroplastica anatomica mi limito a citare i seguenti lavori: *La ceroplastica nella scienza e nell'arte. Atti del convegno (Firenze, 3-7 giugno 1975)*, 2 vols., Firenze, L.S. Olschki, 1977, vol. 1, pp. 257-279; R.A. Bernabeo, *L'iconografia anatomica fra arte e scienza*, Bologna, Società Editrice Esculapio, 1984; F. Dal Forno, *La ceroplastica anatomica e il suo restauro*, Firenze, Nardini Editore, 2009; A. Maerker, *Model Experts. Wax anatomies and Enlightenment in Florence and Vienna, 1775-1815*, Manchester-New York, Manchester University Press, 2011; L. Dacome, *Malleable Anatomies. Models, makers and material culture in Eighteenth-Century Italy*, Oxford, Oxford University Press, 2017.

supervisionare la correttezza scientifica dei preparati. Tra la fine del XIX e i primi decenni del XX secolo le industrie scolastiche italiane non sono ancora attrezzate per offrire alle scuole i sussidi appositamente destinati all'insegnamento ormai obbligatorio dell'igiene nella scuola elementare e che – come abbiamo visto – le *Istruzioni ai Programmi per le scuole elementari* del 1905 individuavano (oltre alle «comuni carte anatomiche parietali») proprio nei «modelli in carta pesta», anche se quest'ultima proposta veniva avanzata nei confronti delle sole scuole «meglio provviste» di mezzi economici⁷⁸. Una sottolineatura che ben si comprende, se si valuta le tipologie di strumenti presenti sul mercato che, in quegli anni, vedeva il dominio incontrastato dei produttori francesi e tedeschi.

Tra il XIX e il XX secolo sono diverse, infatti, le ditte che si impongono a livello internazionale nel proporre sussidi didattici sempre più all'avanguardia e rispondenti alle esigenze didattiche delle scuole di tutto il mondo. Una generalissima suddivisione in stagioni storiche di questa produzione si può articolare come segue:

- anni 1830-1900: questa è la fase in cui si affermano le prime manifatture francesi e tedesche specializzate nella produzione di materiali per uso didattico. Relativamente ai sussidi anatomici, in questi anni è Parigi la capitale riconosciuta di questa industria: grazie all'azienda di Louis Auzoux, fondata nel 1822, che propone i suoi rivoluzionari modelli anatomici smontabili in cartapesta⁷⁹; alla Maison Tramond (poi Tramond-Rouppert) che dal 1850 propone anch'essa sussidi anatomici in vari materiali; infine, alla ditta Deyrolle che, fondata da Jean-Baptiste nel 1831 come casa specializzata nella tassidermia ed entomologia, con il nipote Emile Deyrolle amplia la gamma dei suoi prodotti per la scuola e l'università, dalle carte murali agli arredi scolastici, fino ai gessi anatomici. Sul versante tedesco si affermano, tra gli altri, i preparati in cera dello Studio Ziegler di Friburgo guidato da Adolf Zeigler fino al 1889 e poi dal figlio Friedrich (fino al 1936), per citare alcune tra le marche più ricorrenti nelle collezioni anatomiche di tutto il mondo⁸⁰;

⁷⁸ Cfr. I programmi del 1905, in Lombardi, *I programmi per la scuola elementare dal 1860 al 1895*, cit., p. 270.

⁷⁹ Dopo la morte di Auzoux nel 1880 l'azienda continua a operare, prima grazie alla vedova e al cognato Amédée Montaudon e poi, dal 1911, sotto la guida del nipote Jean Montaudon, fino al 1923. Nel 1926 Henri Barral rileva gli stabilimenti di Parigi e in Normandia e li guida per tutto il Novecento, attraverso le crisi economiche e le difficoltà dovute alla II guerra mondiale. Ma è l'avvento della plastica a mettere in ginocchio l'industria dei modelli in cartapesta e a portare gli stabilimenti alla definitiva chiusura nel 1994. Sulla produzione Auzoux cfr. A.B. Davis, *Louis Thomas Jerome Auzoux and the papier mache anatomical model*, in *La ceroplastica nella scienza e nell'arte. Atti del I Congresso Internazionale, Firenze, 3-7 giugno 1975*, cit.; C. Degueuce, D. Gaillard, *Corps de papier. L'anatomie en papier mâché du Docteur Auzoux*, Paris, La Martinière, 2012; Chanal, *L'anatomie plastique du docteur Auzoux, une entreprise au XIX^e siècle*, cit.

⁸⁰ Per una panoramica sui vari produttori menzionati si veda B. Barbian, *Die Geschichte der Anatomischen Sammlung des Institutes für Anatomie in Münster mit besonderer Berücksichtigung*

- anni 1870-1920: sul finire del XIX secolo si affermano nuove tecnologie produttive che favoriscono una veloce produzione in serie di questi sussidi, abbattendo tempi e costi di realizzazione. Cosa che rende i sussidi anatomici più economici e alla portata anche delle scuole pubbliche. Tra queste serie anatomiche innovative troviamo i modelli in gesso, smontabili, che lo scultore Franz Josef Steger realizzò a Lipsia tra il 1870 e il 1904: prima in collaborazione con il Professore di anatomia patologica della locale Università Prof. Carl Ernst Bock (da cui prese il nome la famosa serie anatomica Bock-Steger) e quindi con l'anatomista ed embriologo svizzero Wilhelm His negli anni in cui fu Direttore dell'istituto di Anatomia dell'Università di Lipsia (serie anatomica nota con il nome di Hist-Steger Modelle)⁸¹. Dopo questi modelli in gesso comparvero, quasi in contemporanea, gli ancora più economici modelli in cartapesta dipinta (anch'essi smontabili) come, per esempio quelli prodotti dalla ditta Dr. Benninghoven und Sommer di Berlino tra il 1880 e il 1920. I nuovi modelli in serie in cartapesta, proprio perché «più leggeri e duraturi dei modelli in gesso» (così venivano presentati in un catalogo austriaco del 1910)⁸² ben presto avrebbero a loro volta soppiantato i modelli in gesso, nell'anatomia come nel campo della botanica⁸³.

ihrer historischen Modelle und Präparate. Inaugural Dissertation zur Erlangung des doctor medicinae dentium der Medizinischen Fakultät der Westfälischen Wilhelms-Universität Münster, Gedruckt mit Genehmigung der Medizinischen Fakultät der Westfälischen Wilhelms-Universität Münster, 1 Dezember 2010, pp. 27-30. Sulla storia della produzione, circolazione e uso dei modelli anatomici in Europa cfr. A. Maerker, *Anatomizing the trade. Designing and marketing anatomical models as medical technologies, ca. 1700-1900*, «Technology and Culture», 54/3, July 2013, pp. 531-562.

⁸¹ Sulle serie anatomiche prodotte da Steger cfr. Barbian, *Die Geschichte der Anatomischen Sammlung des Institutes für Anatomie in Münster mit besonderer Berücksichtigung ihrer historischen Modelle und Präparate*, cit., pp. 31-35; L. Spencer, *The Artist's Knife. The art and science of plaster anatomical models at the Harry Brookes Allen Museum of Anatomy and Pathology. The University of Melbourne. A Historiography and Catalogue*, Master Thesis of Public History, [Melbourne], Monash University, 2005, pp. 25-26, 31, 35-36; Ead., *Chance circumstance and folly. Richard Berry and the plaster anatomical collection of the Harry Brookes Allen Museum of Anatomy and Pathology*, «University of Melbourne Collections», vol. 2, July 2008, pp. 3-10, <https://museumsandcollections.unimelb.edu.au/_data/assets/pdf_file/0006/1378806/spencer.pdf> (ultimo accesso: 10.07.2018). Per ulteriori informazioni si segnala la banca dati on line: *University Collections in Germany. The Information Resource on Collections and Museums at Universities of Germany*. A Project at Hermann von Helmholtz-Zentrum für Kulturtechnik, Humboldt-Universität zu Berlin. Project manager Dr. Cornelia Weber, <<http://www.universitaetssammlungen.de>> (ultimo accesso: 10.07.2018).

⁸² Casa Ved[ov]a Pichler & figlio, *Catalogo Illustrato di mezzi didattici. Scelta di mezzi didattici più istruttivi per scuole popolari, cittadine, ginnasi, tecniche, licei ed istituti affini*, Vienna, [Pichler], 1910, p. 4.

⁸³ J.M. Bernal Martínez, M.A. Delgado Martínez, J.D. López Martínez, *El patrimonio histórico-científico como recurso didáctico: de la ciencia en el laboratorio a las ciencias para la vida*, in M.R. Berruezo Albéniz, S. Conejero López (edd.), *El largo camino hacia una educación inclusiva la educación especial y social del siglo XIX a nuestros días*. XV Coloquio de Historia de la

6. *La lotta per la conquista del nuovo mercato scolastico italiano*

Quella che abbiamo tratteggiato assume i contorni di una vera e propria guerra commerciale che vedeva impegnati i grandi produttori d'oltralpe in un susseguirsi di invenzioni e innovazioni tecniche e produttive finalizzate a conquistare il mercato dei sussidi anatomici attraverso l'offerta di prodotti sempre più affidabili ma, al tempo stesso, economicamente sostenibili anche da parte dei nuovi clienti rappresentati dalle scuole pubbliche non solo francesi e tedesche ma di tutt'Europa e di tutto il mondo. Ma qual è la penetrazione di questi prodotti sul mercato scolastico italiano? Una prima risposta arriva dall'esame incrociato dei modelli anatomici presenti nei sette istituti oggetto d'indagine e dei modelli pubblicizzati nei cataloghi scolastici (dal 1902 fino al 1920).

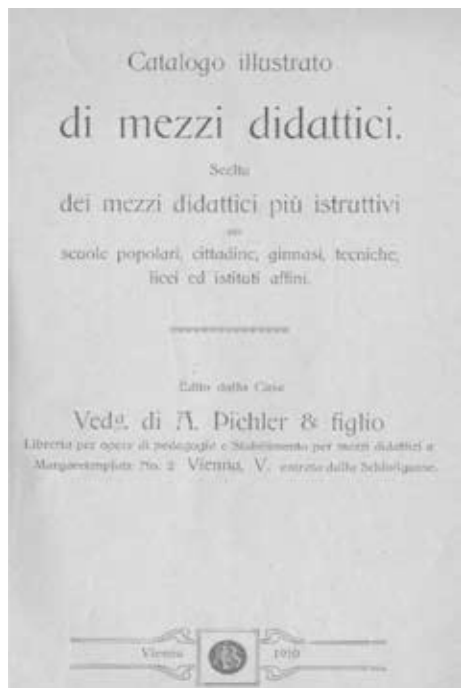
Dall'indagine condotta, il dato eclatante è che gli unici sussidi anatomici che ricorrono immancabilmente in tutti i gabinetti scolastici esaminati risultano essere proprio i modelli in gesso della serie *Bock-Steger* che rappresentavano, all'epoca, i modelli più pregiati, ma anche (relativamente) economici presenti sul mercato. Naturalmente, stranieri.

L'interesse delle scuole per questi materiali innescò presto precise strategie commerciali e dinamiche competitive tra i vari attori in causa. In primo luogo, tra le case produttrici straniere che, subito, compresero il valore economico del nascente mercato scolastico italiano e avviarono una massiccia campagna di esportazione dei loro prodotti verso l'Italia. Un esempio è rappresentato dall'antica casa Pichler di Vienna che nel 1910 pubblica interamente in lingua italiana un corposo catalogo di sussidi di produzione propria e di altre case austriache e tedesche, tra cui figurano anche i «Modelli anatomici plastici in gesso, coloriti al naturale» del «Prf. Dott. Bock» (cfr. Pics. 3a-b).

Un'analogia dinamica si instaurò tra le stesse case italiane che, dopo aver assunto il ruolo di importatori e distributori di prodotti di provenienza estera, spesso entrarono in competizione tra loro. Esempio è il caso della Paravia che, pur essendo l'importatrice dei sussidi anatomici Bock-Steger sin dal 1884 – come sappiamo dai cataloghi, dalle circolari ministeriali e nondimeno dalla testimonianza di contemporanei quali il pedagogista Emanuele Latino⁸⁴ – si trovò presto a subire la concorrenza di una sedicente serie «del dott. Book [*sic*]» reclamizzata come tale dalla Casa Vallardi di Milano ma in realtà consistente in una più economica serie in cartapesta, come si desume anche

Educación, Pamplona-Iruñea, 29, 30 de junio y 1 de julio de 2009, 2 vols., Pamplona, Universidad Pública de Navarra, 2009, vol. 2, pp. 605-614, in partic. p. 613.

⁸⁴ E. Latino, *Giudizii del Prof. Emanuele Latino direttore dell'Archivio di Pedagogia e Scienze sociali intorno ad alcuni sussidi didattici proposti dalla Ditta G.B. Paravia e C.*, Appendice al testo: E. Latino, *Le malattie della scuola e la riforma igienica degli arredi scolastici*, Terza Edizione, Torino, G.B. Paravia & C., 1884, pp. 113-114.



Pics. 3a-b. Copertina del *Catalogo Illustrato di mezzi didattici. Scelta di mezzi didattici più istruttivi per scuole popolari, cittadine, gimnasi, tecniche, licei ed istituti affini*, Vienna, [Pichler], 1910. A p. 3 (a destra) si trova pubblicizzata la serie *Bock-Steger* in gesso, presentata come: «Bock, prf. dott., Modelli anatomici plastici in gesso, coloriti al naturale; alcuni anche ingranditi» (Museo dell'Educazione dell'Università degli studi di Padova).

dai prezzi (probabilmente si tratta dei sussidi in cartapesta prodotti dalla citata Benninghoven und Sommer di Berlino: Pics. 4c-d)⁸⁵. Questa stessa serie era importata in realtà non solo da Vallardi, ma anche da altre case italiane come la Rinaldo Damiani di Venezia la quale, pur specializzata nella produzione e importazione di sussidi tecnico-scientifici⁸⁶, non disdegnava di proporre ai suoi clienti anche materiali per l'insegnamento delle scienze naturali⁸⁷ (Pic. 4d).

⁸⁵ *Catalogo generale 1906-1907. Libri. Materiale scolastico*, Roma-Milano-Napoli, Antonio Vallardi Editore, [1906], p. 34; *Catalogo generale 1908-1909*, Roma-Milano-Napoli, Antonio Vallardi Editore, [1908], p. 35 (Collezione Museo della Scuola Paolo e Ornella Ricca, Università di Macerata).

⁸⁶ Sulle strumentazioni scientifiche realizzate e/o importate dalla Damiani, si veda il catalogo: *Apparecchi di Fisica*, Rinaldo Damiani, Venezia, [ca. 1900-1910] (in: Liceo Cagnazzi, *Gli strumenti della scienza. Catalogo 1800-1900*, Altamura, 2011, p. 35).

⁸⁷ Oltre alle apparecchiature tecnico-scientifiche la casa Damiani importava dall'estero anche sussidi per le scienze naturali (cfr. N. Novarini, *Le collezioni erpetologiche del Museo di Storia Naturale di Venezia: cronologia delle acquisizioni e stato delle raccolte / The herpetological collections of the Museo di Storia Naturale of Venice: chronology of the acquisitions and state*



Pic. 4a. Ingrandimento dell'encefalo della Collezione Bock pubblicizzato nel *Catalogo Paravia* del 1902, cit., p. 88.

Pic. 4b. *Modello scomponibile dell'encefalo*. Sulla base un'etichetta riporta: *G.B. Paravia e C. (Figli di I. Vigliardi-Paravia)* e un'altra: «Materiale consigliato dal Ministero della Pubblica Istruzione» (Istituto Comprensivo Enrico Mattei di Matelica. Riproduzione autorizzata dall'autrice, Federica Clementi).

In particolare la Vallardi – che per la Paravia costituiva un temibile concorrente nel mercato scolastico interno – tentava di attirare l'attenzione dei compratori sui propri sussidi (in cartapesta) citando la stessa Circolare del 21 febbraio 1888 con cui il Ministero della Pubblica Istruzione aveva approvato e consigliato alle Scuole Normali l'acquisto della collezione Bock-Steger in gesso importata dalla Paravia. A lungo la casa torinese denuncerà quella che reputa una concorrenza sleale, riportando nei propri cataloghi l'esplicita avvertenza che: «Si vendono altri modelli segnati nei Cataloghi, *imitazioni plastiche dei modelli del prof. BOCK*, ma si noti che i nostri sono i soli consigliati dal Ministero» (Pic. 5)⁸⁸.

Per rimarcare il fatto che i propri sono gli originali sussidi tedeschi autorizzati dal Ministero, la Paravia non esita a contrassegnare tutti i modelli Bock-Steger con una vistosa etichetta recante la formula: «Materiale consigliato dal Ministero della Pubblica Istruzione» (Pics. 6a-c). Questa vistosa striscia, come anche l'etichetta «Paravia», finiscono per eclissare – o in qualche caso persino sostituire – gli originali contrassegni tedeschi che, non di rado, risultano mancanti (Pic. 6b).

A prescindere dalle varie modalità con cui questa “stratigrafia” delle etichette si manifesta sui vari sussidi ritrovati⁸⁹, resta il fatto che con l'apposizione

of the collections, «*Museologia Scientifica. Memorie*», n. 5, 2010, pp. 92-105) compresi i sussidi anatomici, come testimoniano i modelli anatomici etichettati «Damiani & Figlio-Venezia» rinvenuti presso l'Istituto Tecnico Agrario Celso Ulpiani di Ascoli Piceno.

⁸⁸ Cfr. il *Catalogo Paravia* del 1902, cit., p. 88; la stessa avvertenza è presente anche nel successivo *Catalogo del materiale scolastico per gli asili infantili e le scuole elementari. Anno scolastico 1910-1911*, Torino, Ditta G.B. Paravia, 1910, pp. 67-68. I corsivi sono miei.

⁸⁹ Sulla natura e sulle cause di questa caduta e/o sovrapposizione di etichette originali,



Pic. 4c. (sinistra) Testa muscolare. Ingrandimento dal Catalogo Vallardi del 1906, cit. (p. 34). Modello della serie reclamizzata come «Sistema del Dottor Book» (ma in realtà altra serie, sicuramente di provenienza tedesca).

Pic. 4d. (destra) Testa muscolare con cranio scoperto. L'etichetta riporta «Ditta R. Damiani e Figlio, Venezia», che è il nome dell'importatore italiano. (Istituto Tecnico Agrario Celso Ulpiani di Ascoli Piceno. Riproduzione autorizzata dall'autrice, Roberta De Angelis).



Pic. 5. Da: *Catalogo della ditta G.B. Paravia*, 1902, cit., p. 88. Si noti l'avvertenza, evidenziata dalla *manicula* tipografica: «Si vendono altri modelli segnati nei Cataloghi, imitazioni plastiche dei modelli del prof. BOCK, ma si noti che i nostri sono i soli consigliati dal Ministero».



Pic. 6a. Oltre all'etichetta «G.B. Paravia e C. (Figli di I. Vigliardi-Paravia)», sulla base del modello Bock-Steger è visibile l'etichetta: «Materiale consigliato dal Ministero della Pubblica Istruzione» (c/o Istituto Comprensivo Enrico Mattei di Matelica).



Pics. 6b-c. Le varie etichette presenti su modello di Organo respiratorio scomponibile della serie Bock-Steger.

(In alto). Sono visibili: a sinistra, l'impronta dell'originaria etichetta della Bock-Steger Lips (presente in altri sussidi analoghi ma qui scomparsa); al centro, il timbro della Paravia; a destra, l'inventario patrimoniale.

(Sotto). Sul piede del modello si nota la lunga etichetta cartacea con la formula: «Materiale consigliato dal Ministero della Pubblica Istruzione». (c/o Istituto Tecnico Agrario Celso Ulpiani di Ascoli Piceno).

della formula ministeriale la casa torinese cercava di tutelare i propri interessi contro la concorrenza degli altri importatori italiani. La circolare ministeriale del 1888 si colloca indubbiamente in un contesto – caotico, forse anche sregolato e sicuramente di grande confusione per i consumatori – che vede in forte competizione produttori, distributori e concessionari per l'Italia. Una situazione che perdurerà fino agli anni Venti quando, come vedremo, prenderà finalmente forma una prima, vera industria nazionale dei modelli anatomici.

7. Il “sorpasso” dell'industria scolastica italiana su quella straniera

Questo clima di accesa rivalità tra importatori italiani e stranieri, e soprattutto tra importatori italiani e italiani, perdurerà sino alla nascita di un'industria italiana capace di rispondere alle esigenze del mercato scolastico interno e, gradualmente, affrancarsi dalla dipendenza dalle aziende straniere. Per i sussidi anatomici ciò accade nel 1922 quando la Paravia apre nella propria sede di

vecchie e nuove, e sulle problematiche che ne derivano in sede di descrizione e catalogazione dei sussidi, rimando alle più approfondite riflessioni da me esposte in Brunelli, *Pour une histoire de la production industrielle des matériels didactiques en Italie de la fin du XIXe a la première moitié du XXe siècle: premières indications et perspectives de recherche*, cit.

Torino un nuovo «reparto modelli anatomici»⁹⁰. Avviato dal Prof. Romeo Fusari «direttore dell'Istituto di Anatomia normale della R. Università di Torino, dapprima, e sotto la direzione non meno precisa e valente del Dr. Angelo Cesare Bruni, docente nella stessa R. Università»⁹¹, questo reparto inaugura la propria attività pubblicando il suo primo Catalogo commerciale interamente dedicato ai sussidi anatomici. Nella prefazione si afferma enfaticamente che:

Da parecchi anni, sormontando ostacoli non lievi e sacrifici tutt'altro che indifferenti, la nostra Casa ha svolto tutto un programma tendente a sottrarre le nostre scuole dalla produzione straniera per quanto ha riguardo ai modelli plastici di Anatomia umana, prima esclusivamente fabbricati all'estero (Germania e Francia) [...] In questi ultimi anni essa ha pressoché ultimata la serie che si era prefissa di poter introdurre nelle scuole⁹².

Certo, sfogliando le belle pagine a colori del catalogo paraviano non si può non notare la fortissima somiglianza con i modelli tedeschi Bock-Steger (Pics. 7 a-c). La casa torinese evidentemente, pur proclamando l'emancipazione dalla produzione straniera, in qualche modo ne adottava e replicava gli stessi canoni estetico-formali ben sapendo che il pubblico italiano vi avrebbe inconsciamente associato le ben note qualità ed eccellenza teutoniche.

Nonostante ciò, si può affermare che il processo è ormai compiuto e, difatti, dai Cataloghi Paravia per la scuola elementare del 1926 e poi del 1934⁹³ i sussidi anatomici importati dall'estero scompaiono per lasciare posto ai soli modelli di produzione nazionale.

Il sorpasso dei modelli anatomici tedeschi o comunque nordeuropei da parte della Paravia è rappresentativo di un fenomeno più generale e che si verifica negli stessi anni anche in altri settori della produzione di sussidi scolastici. Per esempio, questo è ciò che accade per i modelli botanici della ditta tedesca Brendel⁹⁴ o della già citata Deyrolle le quali – dopo aver dominato incontrastate

⁹⁰ [Anonimo], *Notiziario*, «Paraviana», vol. 3, n. 6, giugno 1923 p. 136; cfr. anche Casana Testore, *La Casa Editrice Paravia. Due secoli di attività: 1802-1984*, cit., pp. 93-94.

⁹¹ G.B. Paravia & C., *Catalogo dei Modelli plastici di anatomia umana. Catalogo 1922-1923*, Torino, Paravia, 1922, pp. 3-5.

⁹² *Ibid.* Corsivi miei.

⁹³ G.B. Paravia & C., *Elenco del Mobilio, materiale scolastico e sussidi didattici. Obbligatori o raccomandati per le scuole elementari in perfetta rispondenza ai Programmi Ministeriali 11 Novembre 1923*, «Bollettino Librario mensile. Estratto del Catalogo Generale, Materiale e Sussidi didattici», n. LIII, n. 212, gennaio 1926; *Catalogo del materiale scolastico per le scuole elementari. Programmi nuovissimi – 28 settembre 1934-XII*, Torino [etc.], G.B. Paravia, 1934 (Collezione privata dell'autrice).

⁹⁴ I famosi modelli botanici della ditta Brendel – fondata nel 1866 a Breslau-Wroclaw, e poi spostata a Berlino – ancora oggi sono commercializzati dalla tedesca Phywe di Göttingen. Sulla Brendel cfr. G. Fiorini, L. Maekawa, P. Stiberc, *Save the Plants. Conservation of Brendel Anatomical Botany Models*, «The Book and Paper Group Annual», vol. 27, 2008, pp. 35-45. Per una panoramica sulla storia dei sussidi botanici in Europa cfr. A.-M. Bogaert Damin, *Voyage au coeur des fleurs. Modèles botaniques et flores d'Europe au XIX^e siècle*, Namur, Presses universitaires



Pic. 7a. Frontespizio del nuovo catalogo Paravia: Modelli plastici di anatomia umana. Catalogo 1922-1923, Torino, Paravia, 1922 (collezione privata dell'autrice).



Pic. 7b. (Sopra). Scheletro della mano (p. 26).



Pic. 7c. (Sotto). Scheletro della mano – modello Bock-Steger (esemplare conservato presso il Liceo Classico A. Caro di Fermo).

il mercato internazionale, e dunque anche quello italiano, dei sussidi per l'insegnamento scolastico e universitario delle scienze naturali⁹⁵ – negli anni Venti iniziano a subire la prima concorrenza italiana. Indicativi di questa svolta sono due cataloghi commerciali di quegli anni.

Il primo è il nuovo catalogo per le scuole elementari della Paravia che, nel 1926, propone alle scuole un innovativo set di n. 14 «Fiori di carta pesta, fortemente ingranditi e scomponibili, per l'insegnamento dell'Organografia vegetale»: definiti «nuovissimi modelli di fiori, dovuti all'industria nazionale», questi prodotti «meritano una speciale raccomandazione per l'esattezza e precisione con cui vennero preparati e per il mite loro prezzo»⁹⁶ (Pic. 8.a). I decenni Venti e Trenta sono quelli in cui la Paravia amplia e differenzia la propria produzione di sussidi didattici, come testimonia l'apertura di nuovi reparti produttivi dedicati: non solo quello per i sussidi anatomici o botanici,

de Namur, 2007.

⁹⁵ Bogaert Damin, *Voyage au coeur des fleurs. Modèles botaniques et flores d'Europe au XIX^e siècle*, cit., pp. 157-174.

⁹⁶ G.B. Paravia & C., *Elenco del Mobilio, materiale scolastico e sussidi didattici. Obbligatori o raccomandati per le scuole elementari in perfetta rispondenza ai Programmi Ministeriali 11 Novembre 1923*, cit., p. 23.



Pic. 8a. (sopra). Dettaglio ingrandito Catalogo per le scuole elementari edito da Paravia nel 1926, in cui vengono reclamizzati i «nuovi modelli di fiori, dovuti all'industria nazionale» (Da: G.B. Paravia & C., *Elenco del Mobilio, materiale scolastico e sussidi didattici. Obbligatori o raccomandati per le scuole elementari in perfetta rispondenza ai Programmi Ministeriali 11 Novembre 1923*, cit., p. 23).

ma anche uno specifico un reparto «Museo didattico» (attivo già nel 1924)⁹⁷, un laboratorio delle collezioni tecnologiche, merceologiche e dei preparati in liquido (nel 1937)⁹⁸ o ancora un laboratorio per i preparati microscopici (nel 1939).

Il secondo è il catalogo di sussidi scientifici presentato nell'ottobre del 1927 dal L.I.C.S.-*Laboratorio Italiano di Collezioni Scientifiche* costituitosi in seno alla storica Ditta Augusto Bo di Torino (che già dal 1838 produceva cancelleria per la scuola e per gli uffici)⁹⁹ e guidato dall'insigne botanico Prof. Teodoro Ferraris¹⁰⁰. Quello del 1927 è il «primo catalogo» del L.I.C.S. e vi si reclamizza un ricchissimo campionario di scienze naturali che comprende anche una serie di sussidi botanici disegnati dallo stesso Ferraris (Pic. 8.b). Anche in questo caso il catalogo annuncia la nuova produzione con toni trionfalistici

⁹⁷ [Anonimo], *L'attività di casa Paravia*, «Paraviana», vol. 7, nn. 6-7, nov.-dic. 1938, pp. 147-149.

⁹⁸ P. Casana Testore, *La casa editrice Paravia: due secoli di attività*, 1802-1984, Torino, Paravia, 1984, p. 93-94.

⁹⁹ Questa ditta viene fondata nel 1838 a Torino da Augusto Bo e, nei primi decenni di attività, si specializza nella produzione di articoli di cartoleria come inchiostri per penne, ceralacca, colla, gessetti, pastelli, colori per artisti ecc. Nel 1927 la FIM-Fabbrica Italiana Matite (a sua volta fondata nel 1927) viene acquisita dalla ditta BO che muta il proprio nome in BO-FIM e, progressivamente, si trasferisce negli stabilimenti di Rivarolo Canavese. Nel 1974 l'azienda registra il nuovo nome di Boreado e diventa leader nella produzione e vendita di una vasta gamma di articoli per il disegno e la scrittura per scuola e l'ufficio. Rilevata nel 1989 dalla multinazionale francese Omyacolor, principale produttore mondiale di gessetti per scrivere e disegnare, cessa l'attività produttiva di Rivarolo Canavese nel 2000.

¹⁰⁰ Teodoro Ferraris era Direttore della Regia Scuola di Viticoltura ed Enologia Umberto I di Alba e autore di fortunati manuali scolastici di patologia vegetale.

che ben restituiscono la soddisfazione dei produttori italiani per la nascita di un'industria nazionale: in particolare nella presentazione *Ai signori insegnanti* il Ferraris rivendica il valore strategico di questa «branca di industria in Italia» che permette di «svincolare la Scuola Italiana dall'obbligo di provvedersi all'estero del materiale didattico che le occorre» giacché «nelle Scuole Italiane si deve studiare su materiale italiano»:

Ai Signori Insegnanti

Il Laboratorio Italiano di Collezioni Scientifiche, nel presentare il suo primo completo Catalogo Generale, sente l'orgoglio di poter dichiarare che tutto quanto il materiale elencato è di produzione italiana, e più precisamente di produzione sua. I numerosissimi plausi già pervenuti da parte delle più competenti Autorità e dai Signori Insegnanti, per l'eccellenza, la varietà e la originalità della produzione, ci incoraggiano a proseguire con rinnovata fiducia, allo scopo di poter completamente svincolare la Scuola Italiana dall'obbligo di provvedersi all'estero del materiale didattico che le occorre. Nelle Scuole Italiane si deve studiare su materiale italiano. Per questa branca di industria che è unica in Italia, il Laboratorio conosce la importanza grandissima e sente la delicatezza del compito, ma ha la ferma volontà e la sicurezza di poter raggiungere la meta. Il buon volere e l'appoggio dei Signori Insegnanti non mancherà di facilitarla e accelerarla.
Torino, ottobre 1927¹⁰¹.

Come si vede, durante il Ventennio il processo di modernizzazione dell'industria scolastica in qualche modo finisce per saldarsi ai valori e all'ideologia del Fascismo, il quale guardava con favore a un "consumo patriottico" che privilegiasse i prodotti dell'industria nazionale¹⁰². Anche questo fattore imprese all'industria nazionale un'ulteriore spinta, seppur per pochi anni ancora: prima cioè che il tracollo e i bombardamenti della guerra ormai imminente danneggino gravemente le industrie italiane, comprese le case produttrici di sussidi scolastici. Ma quella dell'industria per la scuola nel Secondo dopoguerra appartiene a un nuovo capitolo della storia italiana.

Conclusioni

L'indagine avviata sul patrimonio storico-didattico degli istituti scolastici marchigiani ha costituito il punto di partenza per intraprendere una serie di ricerche incrociate che hanno permesso non solo di confrontare i sussidi conservati con i sussidi descritti nei cataloghi commerciali dell'epoca, ma anche

¹⁰¹ Cfr. la lettera «Ai Signori Insegnanti» nel *Catalogo generale. Reparto L.I.C.S. Laboratorio Italiano di Collezioni Scientifiche*, cit., Tav. N. 1.

¹⁰² Sulla produzione patriottica degli anni Venti e Trenta cfr. F. Targhetta, *La capitale dell'impero di carta. Editori per la scuola a Torino nella prima metà del Novecento*, Torino, SEI, 2007, pp. 22-23.

di triangolare questi dati con quanto la normativa scolastica e ministeriale prescriveva al riguardo. Quello che queste nuove fonti ci restituiscono è il quadro complesso dell'evoluzione del mercato scolastico in Italia come del graduale affermarsi di una vera e propria industria nazionale: il tutto, nell'arco di un periodo cruciale per la storia italiana, quello che va dall'unificazione fino alla Seconda guerra mondiale.

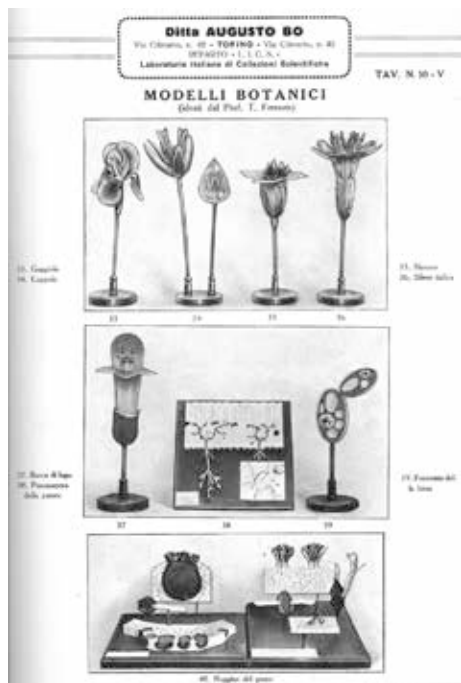
La ricerca ha permesso di delineare una periodizzazione storica che vede, nel primo trentennio dopo l'unificazione, la già affermata industria scolastica nordeuropea (tedesca, francese e britannica) acquisire il controllo di gran parte del mercato italiano, specialmente per quanto riguarda la produzione di sussidi altamente specializzati (come i modelli anatomici, oggetto del presente lavoro). Materiali, questi, che i produttori stranieri vendono alle scuole della penisola o direttamente attraverso i propri cataloghi (come fa la casa Pichler di Vienna, che pubblica un catalogo interamente in lingua italiana) o avvalendosi di distributori terzi. Questi distributori possono operare a livello internazionale (come nel caso della stessa Pichler, che vende, oltre ai propri, anche i sussidi di altre aziende tedesche)¹⁰³ o direttamente su suolo nazionale: come fanno negli Usa la compagnia Queen & Co. di Philadelphia, in Australia la ditta Selby & Co.¹⁰⁴, o in Italia la Paravia, la Vallardi o la Rinaldo Damiani (che importano e commercializzano i sussidi tedeschi di anatomia), o ancora la ditta di Alberto Dall'Eco di Firenze (che distribuisce i modelli botanici di Brendel in Italia)¹⁰⁵ e molte altre ancora.

Dopo questa prima fase – in cui le ditte italiane sono in grado di produrre in proprio solo una limitata serie di oggetti principalmente consistenti in sussidi di natura tipografica e cartacea (come manuali, opuscoli didattici o carte murali) – si assiste gradualmente alla nascita di nuove aziende, laboratori e reparti dotati di infrastrutture produttive sempre più specializzate nella realizzazione dei sussidi richiesti dalle scuole di ogni ordine e grado, a partire dalla scuola elementare che, come abbiamo visto analizzando l'evoluzione dei sussidi di anatomia, fa da

¹⁰³ Nel già menzionato *Catalogo Pichler* del 1910 la casa viennese distribuisce, ad esempio, i famosi modelli zootecnici prodotti da Karl Landsberg a Berlino (pp. 82-83), i modelli anatomici *Bock-Steger* (pp. 3-4), oltre a una ricchissima collezione di «Modelli botanici notevolmente ingranditi», molti dei quali riferibili alla produzione Brendel (come si evince dalle immagini riprodotte e dai piedistalli con relative etichette: pp. 52-57).

¹⁰⁴ L'americana *Queen & Co.* e l'australiana *Selby & Co.* importano dall'Europa sia i famosi modelli anatomici del Dr. Louis Auzoux sia la più economica serie Bock-Steger. Cfr. *Abridged Catalogue of Optical Instruments-Mathematical Instruments, Physical Apparatus, Meteorological Instruments*, Philadelphia, J.W. Queen & Co., 1883, [p. 38] (on line: <<http://www.sil.si.edu/digitalcollections/trade-literature/scientific-instruments/files/52505/>> (ultimo accesso: 10.07.2018); A. Gerner, *Mimicking the dead. Nineteenth-century papier-mâché anatomical models and the teaching of anatomy at the University of Melbourne*, «University of Melbourne Collections», vol. 11, December 2012, pp. 18-23.

¹⁰⁵ Fiorini, Maekawa, Stiber, *Save the Plants: Conservation of Brendel Anatomical Botany Models*, cit., p. 39.



Pic. 8b. Alcuni dei «modelli botanici ideati dal Prof. T. Ferraris». Da: Ditta Augusto Bo, *Catalogo generale. Reparto L.I.C.S. Laboratorio Italiano di Collezioni Scientifiche*, cit., Tav. N. 10-V.

vero e proprio “traino” all’emergente industria nazionale.

Il caso della Paravia è esemplare della parabola industriale che l’industria scolastica italiana compie in quasi settant’anni e che può essere ricostruita dettagliatamente anche attraverso lo studio della quantità, e delle caratteristiche, dei cataloghi commerciali pubblicati in questo lasso di tempo. Se nel 1864, infatti, la casa torinese dà alle stampe un modesto cataloghino di appena 24 pagine in cui il materiale scolastico si limitava ai pochi sussidi obbligatori indicati dal *Regolamento delle scuole elementari del 1860* («carte murali», «pallottolieri» e «globi terrestri») ¹⁰⁶, la situazione muta totalmente nel 1935 quando ormai al materiale scolastico non solo è dedicato un autonomo e corposo catalogo (relativo alle sole scuole elementari) di ben 202 pagine ¹⁰⁷, ma ad esso si aggiungono numerosi altri cataloghi tematici come: un *Catalogo dei sussidi didattici e dei libri per l’insegnamento*

delle scienze naturali (146 pp.), un *Catalogo del materiale di fisica. Produzione italiana della Casa Antonio Tarquini* (129 pp.), un *Catalogo dei sussidi didattici e dei libri per lo studio e la propaganda dell’agraria* (76 pp.) ¹⁰⁸, un *Catalogo degli attrezzi e dei giochi ginnastici* (36 pp.) e altri ancora ¹⁰⁹.

Al crescente consolidarsi di un’industria scolastica nazionale contribuiscono non solo il progresso della scuola italiana, della didattica scolastica e della

¹⁰⁶ I sussidi in vendita corrispondono a quelli previsti dal *Regolamento* ovvero: «Cartelloni per esercizi di lettura [...], Pallottolieri [...], Globi terrestri e celesti [...], Carte geografiche murali [...], Campioni dei pesi e delle misure [...], Quadri iconografici per l’insegnamento della storia naturale [...], Collezioni di solidi geometrici». Cf. *Elenco di libri ed oggetti per le scuole normali-magistrali, elementari, tecniche, ginnasiali e liceali vendibili presso G.B. Paravia e Comp. Tipografi-Librari. Parte prima: Scuole elementari, normali e magistrali. 25 ottobre 1864*, Torino-Milano, Paravia e Comp., 1864, pp. 3-5 e 23 (Collezioni Università di Macerata).

¹⁰⁷ *Catalogo del materiale scolastico per le scuole elementari. Programmi nuovissimi - 28 settembre 1934-XII*, Torino [etc.], Paravia, 1934 (Collezioni Università di Macerata).

¹⁰⁸ [Anonimo], *Cataloghi Paravia 1935 - XIII*, «Paraviana», vol. 14, n. 1, aprile 1935, p. 16.

¹⁰⁹ Cfr. «Paraviana», vol. 14, n. 1, aprile 1935, pubblicità sulla copertina posteriore.

pedagogia ad essa sottintesa, ma soprattutto l'evoluzione delle politiche centrali per l'istruzione pubblica. Se nell'Ottocento la nascita di un sistema nazionale per l'istruzione di massa, gratuita e obbligatoria crea le premesse del «mercato scolastico», nel corso del Novecento il progressivo innalzamento dell'obbligo scolastico – che la Legge Orlando del 1904 estende ai 12 anni, e la Riforma Gentile del 1923, ai 14 anni¹¹⁰ – lo Stato *amplia* quello stesso mercato e in qualche modo lo *governa*, arrivando a prescrivere i sussidi didattici obbligatori per ogni classe e per ogni corso. Più specificamente, nel momento in cui vengono emesse specifiche circolari che autorizzano e “consigliano” alle scuole l'acquisto di alcuni sussidi il Ministero mostra di voler accreditare alcuni prodotti anziché ad altri, finendo per favorire alcuni distributori rispetto ad altri, condizionando di fatto il mercato stesso. Il caso sopra descritto della serie *Bock-Steger* pare in qualche modo configurare – per i sussidi anatomici – un fenomeno analogo a quello, ancora più ampio, che Gianfranco Bandini ha riscontrato per i libri di testo in occasione dell'emanazione dei nuovi Programmi del 1867 i quali contenevano indicazioni bibliografiche così puntuali da destare il sospetto che il ministro Coppino intendesse favorire alcuni autori ed editori di libri scolastici in particolare (nella fattispecie le case fiorentine) contro il dilagante strapotere delle case editrici del Nord-Italia¹¹¹. Un aspetto di grande rilievo, questo, che non potrà non essere preso in considerazione nel prosieguo delle ricerche, anche alla luce di nuovi e approfonditi scavi archivistici sulla documentazione ministeriale.

Ciò che si può con certezza affermare, in sede di conclusioni, è che i sussidi didattici come i cataloghi commerciali si confermano essere non solo fonti informative ma vere e proprie fonti storiche in grado di dialogare tra di loro e con altre fonti di stampo più tradizionale (dalle fonti archivistiche alla normativa scolastica), restituendoci così il punto di vista degli editori e delle case produttrici. In particolare, i cataloghi scolastici dimostrano un valore euristico e interpretativo che risulta potenziato dall'opportunità, offerta oggi dalle numerose collezioni scolastiche presenti sul territorio, di confrontare il materiale reclamizzato dai produttori/distributori con i sussidi che effettivamente vennero acquistati dalle scuole. Sotto quest'aspetto i materiali esaminati si presentano come delle fonti “dinamiche” capaci cioè di offrire molteplici

¹¹⁰ In aggiunta, non si dimentichi che proprio la Riforma Gentile impose l'istituzione di «Gabinetti scientifici moderni e aggiornati» presso le scuole superiori di ogni ordine e grado: medie, di avviamento professionale e superiori. Cfr. il R. Decreto 20 aprile 1924 n. 965: *Ordinamento interno delle Giunte e dei regi istituti di istruzione media* e, in particolare nel Capo XIV (*Del materiale didattico e scientifico*), si veda la dettagliata elencazione dei materiali stabiliti per ogni istituto scolastico: dalle scuole complementari ai licei agli istituti magistrali, tecnici ecc. (Artt. 121-128).

¹¹¹ G. Bandini, *La politica scolastica del ministro P.I. Michele Coppino e l'editoria fiorentina*, in Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento. La tradizione toscana e le nuove realtà del primo Novecento in Italia*, cit., pp. 77-95, in partic. pp. 86-95.

risposte se interrogate sotto prospettive differenziate che tengano conto dei dati che si possono ricavare da:

1. la comparazione di serie omogenee di sussidi (identici o simili tra loro), dei relativi dati fisici (misure, materiali, tecnica di costruzione, peso, ecc.) e delle immagini;
2. l'esame e il censimento dei contrassegni visibili (e non più visibili) come timbri, etichette o altro, relativi ai marchi di fabbrica (o ai contrassegni degli importatori);
3. il confronto sistematico – laddove possibile – sugli inventari patrimoniali delle scuole;
4. l'analisi dettagliata dei cataloghi commerciali dei produttori e rivenditori di materiali scolastici (spesso conservati nei musei e centri di ricerca storico-educativa, negli archivi e biblioteche scolastici, negli archivi storici delle aziende, negli archivi comunali ecc.);
5. lo studio del carteggio archivistico tra Ministero, scuole, aziende, enti locali ecc.;
6. infine, l'analisi di normative, regolamenti e prescrizioni ministeriali, letti e interpretati alla luce delle testimonianze contemporanee (di pedagogisti, maestri, ispettori) sul reale uso e “consumo” di questi oggetti nelle scuole.

Lavorare in forma integrata su queste fonti comporta un programma di lavoro indubbiamente rigoroso, ma la metodologia d'indagine qui delineata evidenzia tutte le potenzialità dei nuovi percorsi di ricerca che ne potranno scaturire e che daranno presto i propri frutti, nell'ottica di una collaborazione sempre più stretta tra storici dell'educazione, storici delle discipline scientifiche e delle relative didattiche disciplinari (si pensi alla storia della medicina) e storici dell'economia e dell'industria, ma anche tra musei del patrimonio storico-scolastico e musei scientifici: uniti nel comune intento di salvaguardare, riscoprire e valorizzare un patrimonio e una storia che appartengono a tutti noi.

Montessori Pedagogy, an educational alternative, from Romania. Evolution from the beginning of the 20th century until the Second World War contribution

Carmen Maria Chişiu
Lucian Blaga University
Sibiu (Romania)
carmenmaria.chisiu@ulbsibiu.ro

ABSTRACT: Montessori Pedagogy, having as a founder M. Montessori, Italian physician and pedagogue, is one of the alternatives that entered Romania at the beginning of the 20th century, due to the opening of the occupants of those times. We present in this paper the evolution in Romania of Montessori pedagogy and educational alternative, from the beginning to the Second World War. We will refer to the interest that the ideas of M. Montessori have made, translations of her works in Romanian, as well as the writings of some Romanian specialists who have popularized and supported her. We will bring readers' attention and involvement issues by attending conferences and training courses for teachers, by setting up the Montessori schools and the role of renowned personalities in the development of the Montessori alternative and the Montessori Association, an expression of the interest and appreciation.

EET/TEE KEYWORDS: History of pedagogy; Pedagogy; Montessori method; Romania; XXth Century.

Introduction

In Romania the evolution of educational alternatives has five stages:

1. Native precursors (second half of the 19th century);
2. New education in Romania at the beginning of the 20th century;
3. Critical approach, application and experimentation (Romanian interwar contributions);
4. «The silence lesson» (communist period);

5. Returning to educational pluralism after 1989.

Academician Spiru Haret was assigned three mandates as Minister of Public Instruction and Cults (1897-1899, 1901-1904, 1907-1910). During his reform, the school's orientation towards the New Education emerged.

Spiru Haret's reform was inspired by the experience gained from foreign studies «from outside», and was accomplished by turning «backwards» to change the «home situation».

Kept in a more or less changed form, the educational policy (orientation and structure of the system) made by Spiru Haret ensured the course and principles of the Romanian school until the interwar period, being considered the basis of the development of education in Romania between the two World Wars.

The orientations have changed since 1945, by the coming into power of the communist regime, which followed the Soviet model, alien and distant from everything that specifically meant European.

In this period, we are tricking on the stage of the National Precursors, but especially at the New Education stage in Romania, from what we have called, stages in the evolution of alternatives.

The Montessori Pedagogy, having as a founder Maria Montessori, an Italian physician and pedagogue (1870-1952), is one of the alternatives that has penetrated in Romania during the period we are dealing with, having an oscillating evolution; in the times of opening manifested by the rulers, it grew, then went through stages of decrement and absence, in «The Silence Lesson» stage.

1. *About the Montessori pedagogy*

Montessori education, in the vision of the one who founded it, Dr. Maria Montessori, aims to teach the child to think and act independently in a responsible manner.

Over the last hundred years Marie Montessori's ideas have had an increasing influence on world education. However, while individual elements of her program are included in many classes every year, there is an extraordinary impact when schools fully implement the entire Montessori model. When this pattern is applied well, it is possible for children to experience profound changes. Montessori schools are designed to help each student discover and maximize their unique talents and talents.

The philosophy of the Montessori education method is based on the concern to give all children the opportunity to develop to their maximum potential and the freedom to find solutions to their own problems. Automotivation being considered the key to full learning, the child and the learning are placed the first and teaching and curriculum on the second place.

The education method is a scientific method, based on the child's objective observation, the preparation of the training environment based on the observations made and the conception of the educational program in a creative way, depending on the needs of the child.

2. First translations of Maria Montessori's work and writings on Montessori pedagogy, in Romania

Constantin V. Buteureanu, a primary school teacher from Iasi, was one of the followers, supporters and spreading the new ideas of Montessori pedagogy. He wrote the article *Montessori Method*, about Maria Montessori, in the *School of the Future* magazine, no. 2 in 1913.

The first translations in Romanian of the works of Maria Montessoris were also made by Constantin V. Buteureanu. The book *The Method of Pedagogy Applied to the Education of Small Children* was first translated, translated only a few years after the publication of this book in Italian, published in 1914, printed in Iasi, at Progresul Printing House, in 1915 at the Schools Bookshop Publishing House, C. Sfetlea, Bucharest and in 1922 at Cartea Romaneasca Publishing House, Bucharest.

Constantin V. Buteureanu makes the translation of Maria Montessori's other fundamental book, *Self-education in Elementary Schools*, a sequel of the volume *Method of Pedagogy Applied in Children's Education in the Houses of Bambini*, published in 1922 and which in Romanian was partially published in this single edition.

In the same year he published the *Medical Pedagogy*, containing a summary of the lessons taught in Rome to Orthophrenic Ordinary School, in 1900, with the full title of the *Montessori Teacher's Summary of Teaching Lessons* followed by an individual study book of the child, including anthropometric data. periodic measurements of height, weight, psychological observations, one of the first Individual Student Fiches, based on the *Pedagogical Anthropology*, published in 1903.

Izabela Sadoveanu, a teacher of pedagogy, a normal school headmaster and inspector, a woman's rights fighter, for the modernization of the school, was another zealous propagandist of Maria Montessori's work. She was not a direct student of Maria Montessori, but she attended an initiation course, supported by Teresa Bontempi, in Switzerland.

She published *The Montessori Methods and the Montessori Didactic Material* in 1915 in the 3rd Volume of the *Pedagogical Museum Bulletin* and separated, with 14 illustrations in 1916, studies with the same titles in *The Graphic Arts Workshop*, C. Stetea, Bucharest.

Convinced by the value of the ideal, Izabela Sadoveanu applied the Montessori method in kindergartens in the elementary classes, in the school for the railways workers' children in Steaua neighbourhood and in the Children's House in the Grand neighbourhood in Bucharest; she set up a Montessori school for puericulture in Bucharest.

In 1925, he experimented with the kindergarten method of the National Office for Physical Education, held training courses for educators and contributed greatly to the dissemination of Montessori ideas and methods in our country.

In 1930, she published the *New Education*, in which she detailed the Montessori method, based on the *Book of Scientific Pedagogy* published by Maria Montessori in 1921. In the above-mentioned paper she added some of her own chapters, giving a detailed description documented the Montessori ideas and how to apply the method.

She supervised the Montessori fabrication in the School House workshops, but without collaborating with Maria Montessori, with the Montessori Association in Italy, or the Montessori International Association, associations in charge of coordinating and organizing courses and producing materials.

The representative of the Tacey institution in London, which produced the materials according to the author's statement, was, between the two world wars, the Romanian Book Society, in Bucharest.

3. *Other supporters of Montessori pedagogy, in Romania*

Another enthusiastic supporter of this method was Apostol Culea, a pedagogue, teacher and great activist in the field of spreading culture among the masses, describing the Montessori method in his work *Notes from the Italian Culture* as well as articles published in various magazines and newspapers¹.

In 1919, a study by Julia C. Lascaraki, *Contributing to Childhood Pedagogy*, appeared. Two Methods - Froebel and Montessori, where the Montessori method is presented compared to the Froebel method².

Regarding the application of the Montessori method, Gh. Hopu also wrote an article entitled *A New Method for Teaching the ABC*, in the *Teacher's Word*, Roman, no. 1-2, 1925-1926 as well as Ion Blăgăilă, the article titled *Towards a New Method of Writing*, Arad, 1937 and Daniil Popescu, the article entitled *Ideo-Visual Method, in the Field of the School*, Turda, no. 3-5².

¹ E. Zaharian, *Romanian Pedagogy Between the Two World Wars, A History of Educative Ideas*, Bucharest, DP PH, 1971, p. 12.

² C. Barbu, L. Benari, Ghe. Popescu, *Izabela, Sadoveanu*, Bucharest, DP PH, 1970, p. 110.

4. *Representatives of Romania, participants in Montessori congresses and courses*

Maria Montessori's correspondence with I. Sulea Firu shows the intention to organize in the fourth decade of the 20th century courses on the Montessori method in Romania, intentions that did not materialized, mainly because of bad times. No parallel courses could have been held, as it was the case in other countries in Europe, America, Asia, Africa, Australia.

However, between the 1930s and 1940s, in our country as in many other countries, there was a genuine Montesorian movement. Many representatives of preschool, primary, secondary, high school, univesitary education attended courses held by Maria Montessori at the international conferences organized by the Montessori International Association, including Ecaterina Botez, a graduate of the 1930s courses in Rome, a collaborator of Sadoveanu Izabela, in the application of the preschool education method, Lazar Pop, teacher, Elena Rusceac, preschool teacher, Victoria Zăinescu, preschool teacher, Ilie Șulea, professor of philosophy, a graduate of 1931 courses in Rome, Constan a Atanasiu, Maia Paraschivescu, Ana Șerbănescu, preschool teacher, Anina Pogoneanu, professor of philosophy, graduate of the 1934 courses in Nice.

At the second International Congress in 1934, held in Rome, the Romanian delegation was one of the largest, with 20 people participating: educators, teachers in the secondary and university education.

At the 1936 Congress in Rome, Ion Rădulescu Pogoneanu, professor of pedagogy at the Faculty of Philosophy and Letters from Bucharest, participated in the confession of Jean Piaget, the president of the Swiss Montesorion Association³.

I. Pogoneanu also attended the Sixth International Congress of 1937 on Education for Peace⁴.

Maria Montessori's direct students, graduates of some Montessori schools in Italy, Switzerland, Germany, Austria, England: B. Nemeti, who studied the Montesos method at Desda, Berlin and Vienna, Bonolis, studied at Rome, G. Sheibe, who studied at Londa, the teacher Viginia Druguni teanu, who studied in Bellinzona, Switzerland, Pete Lenghel Izano, Mihail Câmpu, Simeon Rusceac, who studied in Rome, as well as his followers or members of the teaching staff in pre-school and elementary education, teachers of philosophy and pedagogy in the secondary education: Alexandina Demetescu, Victoia Petrescu, Anina Pogoneanu and university education: I. Pogoneanu and I. S Firu, who joined the new trends in contemporary pedagogy, wrote studies and articles, held lectures and courses on the Montessori method, and some even applied this method by

³ «The Universe», n. 73, 3rd Octobre 1936.

⁴ «The Universe», n. 221, 13th August 1937.

setting up Montessori schools in different cities of the country: Arad, Timisoara, Constanta, Bucharest, Cluj⁵.

In 1931, Maria Montessori appointed a personal delegate to coordinate the Montesorian activity in our country, naming Ilie Șulea as general manager of the Montessori movement in Romania, empowering him to represent her in Romania, protect her rights, and oversee the fabrication of the Montessori material.

Later, Montessori Amsterdam, the International Association, deserves the task of being a pedagogical representative in Romania.

In 1933, the first edition of *The Child*, in Romanian language, appeared at Cartea Romaneasca Publishing House, previously unpublished in another language. Subsequently, it was published in other languages, then in 1938, amplified, titled *The Mystery of Childhood. Under these two titles*, the book has appeared in many other languages, becoming one of Maria Montessori's most widespread books on child psychology and education.

On the occasion of the first Congress of Educators in Romania, held in Bucharest, in 1933 and after this congress were published various papers in which the Montessori method was presented in comparison with older or newer methods, studies and articles, especially in the Copilul magazine of the Association of Educators in Romania (1933-1944), in the School and the Family of Tomorrow, which appeared between 1928-1939 by Marin Biciulescu, one of the passionate promoters of the new trends in pedagogy, in the Philosophy Magazine, in General Education Review.

Nicolae Titulescu, a member of the Honorary Committee of the Montessori International Association and the Honorary Committee of the Montessorienilo Association of England, became in 1933 an honorific president of the Montessori Association in Romania, founded on December 1, 1933, having as an active president Constantin Rădulescu Motu, as deputy chairman of IR Pogoneanu, both professors at the Faculty of Philosophy and Letters from Bucharest and as a secretary IS Firu, assistant professor at the same faculty.

The first experimental Montessori school, under the guidance of Maria Montessori and under the leadership of I. R Pogoneanu and IS Firu, was set up next to Titu Maiorescu University Pedagogical Seminar in Bucharest, having Elena Rusceac, a graduate of Maria Montessori courses Rome 1931. The method had been experimented with children between two and a half and six years old. The Psychology Laboratory of the Faculty of Philosophy and Letters in Bucharest, headed by Pof. C.Rădulescu Motru and I.N. Nestor directed towards this school a seven-year-old child with disabilities, who soon joined the college and after graduating from school, successfully completed elementary school in private.

⁵ «Communications A.M.I.», Amsterdam, n. 1, p. 26 and nn. 2/3 , 1973, p. 26.

The school had one school year (1934-1935), with furniture and teaching material, according to the Montessori method. Some financial burdens prevented experimentation with children of school age. With the persecution of the fascist regime against Maria Montessori, Montessorian activity was banned in Italy, Germany and other fascist countries.

5. Summary of what followed, in Romania until the Second World War

In Romania, the Montessorian movement weakened especially during the Second World War. After liberation, some of the Montessorian schools here resumed their activity. The Montessori School of Patriotic Defense, which prepared kindergarten teachers and activists in the field of social assistance⁶.

After 1948, the educational policies were deeply oriented towards the Soviet educational model, totally foreign to the European traditions found in Romania before 1948, the concern and interest in the Montessori pedagogy disappearing⁷.

On the initiative of UNESCO, in 1970, the centenary of the birth of Mary Montessori was celebrated in all countries.

In Romania, a Montessori Symposium was held in Bucharest on December 3 1970, where they held speeches and lectures: Prof. George Văideanu, Prof. Al. Fara, Bruno Atturia, Prof. N. Dima, Prof. Stanciu Stoian, Prof. Ștefan Bârsănescu, Prof. Ion Vlad, Prof. Maria Taiban, Prof. Florica Niculescu, Prof. Elena Moldovan, Prof. Victoria Petrescu, Prof. Lenormanda Benari, on various specific issues: Maria Montessori's contribution to the progress of pedagogy, education, moral education, the mistreatment of children with mental deficiencies, the montessorian teaching material, the influence of Maria Montessori's work in kindergartens.

On this occasion, various articles about Maria Montessori and her work appeared in various magazines, including: Colloquies about school and family, the Magazine of Pedagogy and the Magazine of Information and Documentation Center in Social and Political Science.

In 1977, the book *Discovery of the Child* appears in the Romanian language, translated by I. Șulea Firu.

After the Revolution of 1989, when the communist regime ended, the Montessori pedagogy re-energized. The books *Absorbent Mind*, *The Secret of Childhood*, *The Child in the Family*, *Education and Peace* were translated;

⁶ *Montessori School in Valea Jiului Is Back*, «Warrior from Banat», 9th September, 1945, p. 4.

⁷ I.S. Firu, *Montessorism an the problems of nowadays sociaety*, «Magazine of summaries and reviews in Sociology», n. II, 1971, pp. 363-376.

Montessori kindergartens and schools were set up in a favourable setting by recognizing the alternative through the Education Law.

Through *The Children of the World* and *Montessori to Romania* projects in Drobeta Turnu Severin there are the only Montessori groups in Romania in the state education, and a Montessori study and research centre was created with the support of the International Association of International Education in Florence.

Since 2011, the alternative has had a specific curriculum, approved by the Ministry, which is the basis of the focus of all institutions using the Montessori method.

In 2012, the Association for the Montessori Education Development Association in Romania is signed with the Montessori International Association, in order to promote and support the Montessori education standards in Romania.

Since 2013, the Montessori Institute of Bucharest has been organising accredited courses for educators, facilitating the training of teachers and the setting up of Montessori schools in Romania.

Conclusions

Remarkable teachers, through their writings and their work, contributed to the knowledge of Maria Montessori's theoretical and practical work in our country, which devoted her life to the problems of the proper education of children and youth in order to train as full, active and creative personalities.

After 1990, Romania returned to educational pluralism by re-establishing educational alternatives and private education.

Among the educational alternatives now available in Romania, the Montessori alternative, which is dominant at the level of private schools, is also appreciated.

The reform undertaken in the past by the mathematician Spiru Haret, as minister of education, the opening to new education adapted to local specifics, is today often remembered as an exemplary action and which was at the foundation of Montessori education convincing through the freshness of the child's continued discovery, the profound understanding of the human being and the sensitivity to the child's needs.

*Scientific News
and Activities
of Research Centres*



**Cronache scientifiche
e Attività
degli istituti di ricerca**

Gli studi sul patrimonio storico-educativo in Spagna e in Italia. Due realtà a confronto

Lucia Paciaroni
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
l.paciaroni2@unimc.it

Research on historical-educational heritage in Spain and Italy. Realities in comparison

ABSTRACT: The report illustrates the main founding of the seminar intitled «Research on historical-educational heritage in Spain and Italy. Realities in comparison» which was organised by the Society for the study of Historical-Educational Heritage (SIPSE) in collaboration with the University Roma Tre and University of Macerata, and was held in Roma on 15 June 2018. The seminar gave the opportunity to discuss the state of the art of the research on historical-educational heritage in Italy and Spain and to exchange ideas and perspectives about the preservation and the recovering of this heritage.

EET/TEE KEYWORDS: History of education; School material culture; Educational heritage; Teaching aids; Europe; Spain; XIXth-XXth Centuries.

Un'importante occasione per discutere sullo stato dell'arte della ricerca sul patrimonio storico-educativo in Italia e Spagna e per confrontare idee e prospettive sulla conservazione e sul recupero di questo patrimonio. Il 15 giugno 2018 a Roma, presso il Dipartimento di Scienze della Formazione dell'Università Roma Tre, si è svolto il seminario internazionale «Gli studi sul patrimonio storico-educativo in Spagna e in Italia. Due realtà a confronto», organizzato dalla Società Italiana per lo studio del patrimonio storico-educativo in collaborazione con l'Università degli Studi Roma Tre e l'Università degli Studi di Macerata.

L'incontro, che ha visto la partecipazione di numerosi studiosi provenienti da atenei di ogni parte di Italia e della Spagna, ha inteso offrire un'occasione di confronto e approfondimento sul tema della conservazione, del recupero e della

valorizzazione del patrimonio storico-educativo, con una particolare attenzione nei confronti delle attività promosse da parte di società scientifiche italiane e spagnole, rispettivamente la Società Italiana per lo Studio del Patrimonio Storico-Educativo (SIPSE) e la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (SEPHE).

Ad aprire i lavori del seminario è stato Lorenzo Cantatore (direttore del Museo della Scuola e dell'Educazione «Mauro Laeng» dell'Università degli Studi Roma Tre) che ha sottolineato l'importanza della salvaguardia del patrimonio storico-educativo, in particolare della sua componente materiale, riconoscendo che «non si tratta di un lavoro facile tenendo conto che ci si scontra ancora molto spesso con consistenti sacche di insensibilità sia culturale che istituzionale». Cantatore ha evidenziato l'importanza del ruolo della SIPSE, «una società che offre, finalmente, visibilità scientifica al lavoro di recupero, conservazione e valorizzazione del patrimonio storico-educativo» rimarcando, però, la necessità di una sempre maggiore riconoscibilità e legittimazione istituzionale che identifichi i beni scolastici educativi come beni culturali da tutelare. Il corredo materiale è, indiscutibilmente, una fonte storica imprescindibile per la storia della scuola e dell'educazione e le iniziative, gli studi e le ricerche ad esso legate necessitano di una più accurata ricerca scientifica e di una maggiore centralizzazione organizzativa.

A moderare il seminario è stata Carmela Covato che ha posto l'accento sul valore della SIPSE, ribadendo la sua importanza al fine di dare risalto alla straordinaria pregnanza culturale insita nella materialità della vita scolastica, presa in esame nella sua quotidianità e globalità. Covato ha inoltre sottolineato come le fonti da prendere in considerazione siano quelle materiali – come arredi scolastici, lavagne, tabelloni didattici, carte murali e sussidi di vario genere – ma anche quelle immateriali, come le testimonianze del passato.

Covato ha spiegato che oggi è possibile esplorare le potenzialità euristiche di questo patrimonio grazie al superamento di una visione del passato educativo limitata alla storia delle idee pedagogiche che ha caratterizzato gran parte del Novecento e ha finito col tralasciare i vissuti dei soggetti coinvolti nei processi educativi.

Covato ha proseguito sottolineando come negli ultimi decenni del Novecento la storia della scuola da ambito di indagine specialistico sia diventata – da un punto di vista interpretativo e conoscitivo – oggetto di studi più approfonditi. Questa nuova centralità ha restituito una identità diversa allo studio di questa disciplina, determinando la necessità di trovare un riscontro non soltanto nel dibattito teorico ma nella quotidianità della vita scolastica, ridando corporeità ai soggetti che ne fanno parte. Il lavoro della SIPSE, quindi, si inserisce positivamente in un processo in atto ormai da alcuni anni e si pone l'obiettivo di dar voce a questa nuova linea di tendenza storiografica.

La prima relazione del seminario è stata tenuta da Pedro Luis Moreno Martínez che nel suo intervento, dal titolo *El patrimonio histórico-educativo*

como fuente histórica y recurso educativo en España, ha posto l'attenzione sulla ricezione e sulla diffusione degli studi storico-educativi nel suo Paese, sottolineando la spinta raggiunta dalla ricerca in questo ambito a partire dalla metà degli anni Novanta del Novecento in ambito internazionale.

Nel suo intervento ha presentato alcuni dei fattori principali che hanno contribuito al rinnovamento e alla diffusione degli studi sul patrimonio storico-educativo in Spagna e all'affermazione della cultura materiale e immateriale della scuola come campo di ricerca emergente, così come al suo utilizzo come risorsa educativa. In primo luogo, si è concentrato sulla funzione delle mostre e delle esposizioni realizzate negli ultimi tempi, le quali – comprendendo un ampio spettro tematico – hanno contribuito a favorire e a stimolare la ricerca, la ricostruzione della memoria della scuola, il recupero del suo patrimonio e, inoltre, a diffondere e rendere noti i risultati della ricerca storico-educativa ad un pubblico più ampio. In secondo luogo, lo studioso spagnolo ha illustrato i benefici derivanti dall'affermazione della museologia educativa, ponendola in relazione con alcuni recenti risultati raggiunti dalla ricerca sul patrimonio educativo. Una tendenza favorita dallo stretto vincolo esistente tra le istituzioni museali impegnate nella salvaguardia del patrimonio storico-educativo e i progetti di ricerca e le giornate scientifiche promosse negli ultimi anni da singoli studiosi e centri universitari.

Un terzo elemento analizzato è stato il ruolo ricoperto dalle Giornate Scientifiche organizzate dalla SEPHE dal 2005 a oggi e dal loro contributo alla conoscenza storica. Infine, Moreno Martínez ha riflettuto anche sulle iniziative che hanno maggiormente contribuito a promuovere l'uso del patrimonio storico-educativo come una potente risorsa didattica e a sviluppare metodi di insegnamento/apprendimento alternativi utili a diffondere una più ampia conoscenza della storia della scuola e a recuperare la memoria di questo fenomeno collettivo. L'utilizzo in tal senso di questo patrimonio ha permesso di impattare sulle scuole dei diversi ordini e gradi di insegnamento, e al tempo stesso ha favorito la dinamizzazione culturale e l'educazione alla cittadinanza.

Nel successivo intervento, intitolato *Balance y perspectiva de la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (2004-2008)*, Teresa Rabazas Romero ha presentato il bilancio e le principali attività svolte negli ultimi quindici anni dalla società spagnola SEPHE per la conservazione e il recupero del patrimonio storico-educativo. Questa società è stata inserita, nel giugno del 2004, nel registro nazionale delle associazioni culturali del Ministero dell'Interno. Tra gli obiettivi della società, Rabazas Romero ha evidenziato l'interesse per i progressi della conoscenza storico-educativa, gli sviluppi delle nuove strategie museali e i contributi alla promozione delle potenzialità esplicative della memoria, così come del patrimonio della cultura della scuola. Ad oggi la società è formata da 91 soci individuali e 9 soci istituzionali e le sue attività più importanti sono la pubblicazione del bollettino informativo annuale (BISEPHE), la realizzazione biennale delle giornate scientifiche, l'istituzione del

premio annuale Manuel Bartolomé Cossio e il mantenimento di una pagina web destinata ai soci e ai loro studi. Ha, quindi, menzionato i tredici bollettini pubblicati, le otto giornate scientifiche realizzate¹ e le quattro edizioni del Premio *Manuel Bartolomé Cossio* organizzate.

Inoltre, ha fatto riferimento alle collaborazioni della SEPHE con altre società come l'Asociación Nacional para la defensa del Patrimonio de los Insitutos de Segunda Enseñanza Históricos (ANDPIH), con la Red Iberoamericana para la Difusión del Patrimonio Histórico-Educativo (RIDPHE) e con la Società Italiana per lo Studio del Patrimonio Storico-Educativo (SIPSE).

In conclusione del suo intervento, Rabazas Romero ha presentato un nuovo progetto che mira alla creazione di una *Red de Museos, Entidades y Iniciativas sobre Patrimonio Histórico-Educativo (RED-MeinPHE)* per far conoscere le diverse esperienze museali e promuoverne le iniziative, relazionandole anche con altri percorsi di studio e conservazione del patrimonio storico-educativo esistenti in Spagna di natura documentale e/o audiovisiva.

Infine, ha evidenziato che la SEPHE intende contribuire al recupero, alla protezione, alla conservazione, alla ricerca e allo studio del patrimonio storico-educativo in Spagna allo scopo di diffondere nella società civile una maggiore sensibilità nei suoi confronti.

A concludere gli interventi è stata Anna Ascenzi (*La conservazione del patrimonio storico-educativo e la rappresentazione del passato scolastico nei musei della scuola italiani*) che ha illustrato la realtà dei musei italiani del patrimonio storico-educativo così come essa emerge dal censimento OPeN. MuSE (Osservatorio permanente dei musei dell'educazione e dei centri di ricerca sul patrimonio storico-educativo) condotto fino ad oggi dall'Università di Macerata. Una realtà che è importante conoscere anche per evitare che si verifichino fenomeni di dispersione e depauperamento di esso.

Dalla ricerca condotta sulla situazione dei musei rappresentativi del passato scolastico, sono ad oggi almeno cinquanta in Italia i musei che hanno ufficialmente aderito al censimento. Si tratta di musei gestiti e creati da diverse realtà, come scuole, associazioni private, insegnanti in pensione, università ed enti pubblici. Come si vede, i musei del patrimonio storico-educativo non sono dunque una categoria rigida ma si distinguono in base alle esigenze dei loro promotori e alle finalità loro assegnate.

¹ I. Museo Pedagógico de Galicia (MUPEGA), Santiago de Compostela, 2005; II. Centro Internacional de Cultura Escolar (CEINCE), Berlanga de Duero, 2007; III. Museo Pedagógico de Aragón, Huesca, 2008; IV. Museo Virtual de Pedagogía (MUVIP), Vic, 2010; V. Centro de Estudios sobre la Memoria Educativa (CEME)-III Foro Ibérico de Museismo Pedagógico, Murcia, 2012; VI. Museo de Historia de la Educación Manuel Bartolomé Cossío (UCM)-UNED-Universidad de Alcalá de Henares-Institutos Isabel la Católica y San Isidro, Madrid, 2014; VII. Universidad del País Vasco-V Simposio Iberoamericano, San Sebastián, 2016, VIII. Universidad de las Islas Baleares-I Congresso Nazionale della SIPSE, Palma de Mallorca, 2018.

Entrando nello specifico di alcune tipologie museali, emerge che i musei promossi dalle singole scuole sono in costante crescita e rappresentano quasi la metà dei musei esaminati fino ad oggi, di cui costituiscono infatti oltre il 46 per cento. Questi musei hanno la particolarità di essere dedicati alla storia della singola scuola che li ha promossi con l'obiettivo principale di conservare e custodire il proprio patrimonio e celebrare il proprio vissuto. Per quanto riguarda invece i musei più noti all'interno della comunità scientifica nazionale e internazionale degli storici dell'educazione – quelli promossi dalle università –, essi rappresentano l'8 per cento. Sono musei che traggono origine dalla presenza, all'interno dell'ateneo promotore, di una tradizione di ricerca più o meno longeva in ambito storico-educativo che conferisce loro il ruolo di luoghi di giacimento di fonti per la ricerca piuttosto che di semplici raccolte di reliquie scolastiche o luoghi della memoria.

Ascenzi ha evidenziato altri aspetti emersi nel corso della sua ricerca, come ad esempio gli ordini e i gradi scolastici rappresentati dalle esposizioni. Il dato più eclatante è che oltre il 90 per cento delle esposizioni rappresentino la scuola elementare, a conferma del fatto che questi musei sono luoghi della memoria che si concentrano sulla scuola intesa come esperienza collettiva. Per questo motivo ne consegue che l'ordine scolastico più rappresentato è quello che storicamente era frequentato da tutta la popolazione, cioè il primario. Sul versante del periodo storico maggiormente rappresentato invece dai dati emerge che il 43 per cento delle esposizioni non mostra la scuola in un determinato periodo storico ma piuttosto nella sua evoluzione transcronologica; un altro importante 40 per cento, invece, è rappresentato da esposizioni tematiche incentrate sulla scuola fascista.

Al di là della fotografia statistica delle realtà museali italiane, Ascenzi si è fermata a riflettere sulle modalità attraverso cui la scuola viene rappresentata in questi musei. La sensazione è che quella messa in scena non sia «la scuola reale, ma idealizzata, depurata dei suoi aspetti più sgradevoli come la povertà, la sporcizia, il freddo e sublimata in un “non tempo” (quello dell'infanzia) aprioristicamente considerato alla stregua di una età dell'oro». Si tratta di «una scuola in cui tutto è come dovrebbe essere, ma non come realmente era». Ascenzi ha, quindi, invitato gli studiosi a chiedersi «quale sia il reale livello di scientificità degli allestimenti museali, in che modo la ricerca storica possa supportare le scelte museografiche ed espositive di questi musei, quale dovrebbe essere il ruolo degli storici nel supportare queste scelte e questi criteri anche al fine di evitare alterazioni e banalizzazioni della memoria collettiva».

Ascenzi ha concluso facendo riferimento al percorso che la SIPSE si accinge a seguire: «lungo ma entusiasmante, pieno di sfide ma anche di opportunità e con ricadute importanti sulla ricerca scientifica, sulla didattica della storia dell'educazione, della storia della scuola e della letteratura per l'infanzia e sulla terza missione, ossia sulla collaborazione tra Università, territorio e comunità». Solo una sempre più approfondita conoscenza del patrimonio storico-educativo

italiano potrà guidare gli storici della scuola e dell'educazione «nell'esplorare in molteplici direzioni i diversi e complessi fenomeni che sono emersi da questi primi dati».

A chiusura dei lavori, si è svolta la prima assemblea generale straordinaria dei soci SIPSE nel corso della quale sono stati eletti gli organi personali (Presidente, Vice-presidente, Segretario, Tesoriere) in seno al Consiglio direttivo e sono stati ribaditi gli obiettivi principali della società, tra cui l'importanza della internalizzazione – come testimoniato anche dal presente seminario – e l'importanza di collaborazioni con società scientifiche come la SEPHE – auspicata al margine del seminario dai due rappresentanti della società spagnola – e con la omologa francese Association des Amis du Musée National de l'Éducation, des musées de l'école et du Patrimoine Éducatif (AMNEPE).

*International
Bibliography*



**Bibliografia
Internazionale**

International Bibliography of History of Education and Children's Literature (2017)*

Dorena Caroli
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
dorena.caroli@unimc.it

Luigiaurelio Pomante
Department of Education, Cultural
Heritage and Tourism
University of Macerata (Italy)
luigiaurelio.pomante@unimc.it

Introduction

The present *International Bibliography of the history of education and children's literature* about the year 2017 is the sixth of a serie, which has been published in 2013, 2014, 2015, 2016 and 2017 on the international journal «History of Education & Children's Literature» and concerned the eight years period 2010-2017; it was followed by the publication of five 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).

* 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.

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.

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),

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Abbreviations and Acronyms

AABE = «Acta Academiae Beregsasiensis» (Hungary)

ABI = «Ab Imperio» (Russia)

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)
- AJZ = «Academic Journal of Zhejiang» (China)
- 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 = «Biologya 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. Smyсли» (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)
DIALOSV = «Dialog so vremenem» (Russia)
DNV = «Dukhovno-Nravstvennoe Vospitanie» (Russia)
DO = «Docencia» (Chile)
DOS = «Doshkolnik» (Russia)
DOSBRAV = «Doshkol'noe obrazovanie i vospitanie» (Russia)
DOV = «Doshkolnoe Vospitanie» (Russia)
DPRS = «Dimensioni e problemi della ricerca storica» (Italy)
DRL = «Drama Literature» (China)
DSA = «Detsky Sad ot A do Ya» (Russia)
DSS = «Direktor Sel'skoj Shkoly» (Russia)
EASF = «Eastern Forum» (China)
ECOPOL = «Economic and Political Weekly» (India)
ED = «Educación XX1» (Spain)
EDC = «Educatio» (Hungary)
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: egyetemtörténeti közlemények» (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)
GUMNAU = «Gumanitarnye nauki v XXI veke» (Russia)
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)
- HISTCA = «Revista 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)
- HUERI = «Hungarian Educational Research Journal» (Hungary)
- 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)
- 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 = «Innovaccii v Obrazovanii i Lingvistike» (Russia)
- IPAV = «Istoriko-Pedagogichesky Almanakh VLADI» (Russia)
- IPZ = «Istoriko-Pedagogichesky Zhurnal» (Russia)
- IRAO = «Izvestya Rossyskoj Akademii Obrazovanya» (Russia)
- IRCL = «International Research in Children's Literature» (Canada)
- IRGPU = «Izvestya Rossyskogo Gosudarstvennogo Pedagogicheskogo Universiteta im. A.I. Gercena» (Russia)
- IRHED = «International Review of History Education» (Greece)
- ISBRA = «Iskusstvo i obrazovanie» (Russia)
- ISK = «Iskolakultura Könyvek» (Hungary)
- ISPESE = «Istoria pedagogiki segodnya» (Russia)
- ISSRA = «Issledovatel'skaya rabota shkol'nikov» (Russia)
- IST = «Istorija» (Lithuania)
- ISTOBA = «Istoricheskoe badeshte» (Bulgaria)
- ISTPAM = Istoria 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)
- JF = «Jiangnan Forum» (China)
- 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)
JJU = «Journal of Jishou University» (China)
JMCL = «Journal of Modern Chinese Literature» (china)
JOAUT = «Journal of Anhui University of Technology» (China)
JOCHIMU = «Journal of China Marine University» (China)
JOCHU = «Journal of Chengdu University» (China)
JOCHUD = «Journal of China Education» (China)
JOCUT = «Journal of Changchun University of Technology» (China)
JOED = «Journal of Editing» (China)
JOEDU = «Journal of Education (China)
JOFUN = «Journal of Fujian Normal University (Social Science Edition)» (China)
JOGUCOT = «Journal of Guangdong College of Technology» (China)
JOGUNOS = «Journal of Guilin Normal School» (China)
JOGUPS = «Journal of Guilin Professional School» (China)
JOHABS = «Journal of Hainan Broadcast School» (China)
JOHEUT = «Journal of Henan University of Technology» (China)
JOHUCOT = «Journal of Hunan College of Technology» (China)
JOHUNI = «Journal of Hunan University (Education Science Edition)»(China)
JOHUSENS = «Journal of Hubei Second Normal School» (China)
JOINMONU = «Journal of Inner Mongolia Normal University» (China)
JOJCE = «Journal of Jilin College of Education» (China)
JOJIAN = «Journal of Jiangsu Normal University (Social Science Edition)»(China)
JOJUN = «Journal of Jimei University» (China)
JOKUC = «Journal of Kunming College» (China)
JOLACE = «Journal of Lanzhou College of Education» (China)
JOLINS = «Journal of Liuzhou Normal School» (China)
JOLINU = «Journal of Liaoning Normal University» (China)
JOLUNS = «Journal of Luoyang Normal School» (China)
JOMU = «Journal of Mudanjiang University» (China)
JONNU = «Journal of Nanjing Normal University» (China)
JOPLA = «Journal of PLA Foreign Language School» (China)
JOSE = «Journal of Scientific Education» (China)
JOSHANU = «Journal of Shanxi Normal University» (China)

- JOSIPROS = «Journal of Sichuan Professional School» (China)
JOUBENU = «Journal of Hebei Normal University» (China)
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)
JSL = «Journal of School of Literature of Nanjing Normal University» (China)
JSSE = «Journal of Social Science Education» (Germany)
JU = «Jahrbuch für Universitätsgeschichte» (Germany)
JXJ = «Journal of Xi'an Jiaotong University» (China)
KAF = «Kafedra» (Russia)
KAINN = «Kachestvo. Innovacii. Obrazovanie» (Russia)
KATPED = «Katolikus pedagógia (Hungary)
KEK = «Kultúra és közösség» (Hungary)
KEPGY = «Képzés és gyakorlat» (Hungary)
KEPGYA = «Képzés és gyakorlat/Training & Practice» (Hungary)
KJHEDU = «Korean Journal of the History of Education» (Korea)
KJLF = «Kinder- und Jugendliteraturforschung» (Germany)
KK = «Keel ja Kirjandus» (Estonia)

- KLIO = «Klio. Zhurnal dlya uchenykh» (Russia)
- KONNEV = «Könyv és nevelés» (Hungary)
- KOR = «Korrekcionnaya Pedagogika» (Russia)
- KSOP = «Kachestvo Sovremennogo Obrazovanya: Problemy i Putyakh Reshenya» (Russia)
- KULBA= «Különleges bánásmód» (Hungary)
- KULT = «Kultúrne dejiny» (Slovakia)
- KUOBRA = «Kul'tura, Obrazovanie, Nauka» (Russia)
- LANT = «Lantai World» (China)
- Lib-Lib = «Libri & Liberi: časopis za istraživanje dječje književnosti i kulture» (Croatia)
- LIBS = «Library Science» (China)
- LIN = «Linhas» (Brasil)
- 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)
- MD = «Media» (China)
- MDS = «Il mestiere di Storico» (Italy)
- MEDIAOB = «Mediaobrazovanie» (Russia)
- MEDS = «Modern Education Science» (China)
- MEKADO = «Menedzhement kachestva doskol'nogo obrazovanya: istorya i sovremennost'» (Russia)
- MEME = «Modern Elementary and Middle School Education» (China)
- MEMSE = «Modern Elementary and Middle School Education» (China)
- MER = «Memoria e Ricerca» (Italy)
- MES = «Medicina e Storia» (Italy)

- MESU = «Mësuesi» (Albania)
METEP = «Modern Education: Theory and Practice» (China)
MFB = «Mitteilungsblatt des Förderkreises der Bibliothek für Bildungsgeschichtliche Forschung» (Germany)
MGBO = «Mitteilungen der Gesellschaft für Buchforschung in Österreich» (Austria)
MIROB = «Mir obrazovanya - Obrazovanie v mire» (Russia)
MMP = «Matematika i Metodika ee Prepodavanya» (Russia)
MNIM = «Mnimon» (Greece)
MNS = «Medicina nei Secoli» (Italy)
MOD = «Modern Education Science» (China)
MODEC = «Modern Chinese Literature Research Series» (China)
MOOM = «Mir Obrazovanya – Obrazovanie v Mire» (Russia)
MOR= «Modern Reading» (China)
MP = «Magyar Pedagógia» (Hungary)
MSHE = «Methis. Studia humaniora Estonica» (Estonia)
MT = «Magyar Tudomány» (Hungary)
MTR = «Mokslo ir technikos raida» (Lettland)
MVDS = «Muttersprache. Vierteljahresschrift für Deutsche Sprache» (Germany)
NAC = «Nachalnoe Obrazovanie» (Russia)
NACS = «Nachalnaya Shkola» (Russia)
NAER = «Journal of New Approaches in Educational Research» (Spain)
NAR = «Narodnoe Obrazovanie» (Russia)
NAS = «Nauka i Shkola» (Russia)
NASP = «Nachalnaya Shkola Plyus Do i Posle» (Russia)
NASS = «Nanjing Social Science» (China)
NAV = «Nastava i vaspitanje» (Serbia)
N-AZfürR = «Nordost-Archiv: Zeitschrift für Regionalgeschichte» (Germany)
NE = «Neveléstörténet» (Hungary)
NEWPA = «New paideia» (Greece)
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 Issledovaniyakh» (Russia)
NR = «Nauka i Religya» (Russia)
NS = «Neskuchnyj Sad» (Russia)
NSS = «Ningxia Social Science» (China)
OBED = «Observation of Education» (China)
OBRA = «Obrazovanie» (Bulgaria)
OBRA = «Obrazovanie i nauka» (Russia)
OBRAS = «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 = «Obrazovanie v Sovremennoj Shkole» (Russia)
OTECH = «Obrazovanie i tekhnologii. Godishno nauchno-metodicheskoe spisanie» (Bulgaria)
OTS = «Otkrytaya Shkola» (Russia)
OUP = «Obrazovanie v uslovyakh Perekhodana Novye Standarty» (Russia)
OZP = «Otechestvennaya i Zarubezhnaya Pedagogika» (Russia)
PC = «Publication Corner» (China)
PDG = «Pedagogika» (Lithuania)
PDV = «Prepodavatel XXI Vek» (Russia)
PE = «People's Education» (China)
PED = «Pedagogika» (Bulgaria)
PEDASZE = «Pedagógia történeti szemle» (Hungary)
PEDG = «Pedagogika» (Russia)
PEDISK = «Pedagogika iskusstva» (Russia)
PEDIZ = «Pedagogicheskie izmereniya» (Russia)

- PEDS = «Pedagogija (P)» (Serbia)
PEDS = «Pedagoška stvartnost» (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)
PRC = «Publication Review of China» (China)
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 obrazovanya: 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)
PV = «Pedagogia e vita» (Italy)
PZB = «Pedagogicheskij 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)
QI = «Quaderni di intercultura» (Italy)
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)
RDE = «Research of Digital Education» (China)
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)
REL = «Research of Ethnic Literature» (China)
RELUE = «Revista Lusófona de Educação» (Portugal)
REMOCL = «Research of Modern Chinese Literature» (China)
REOSET = «Research of Education and Teaching» (China)
REPD = «Revista Profissão Docente» (Brazil)
REPMA = «Research of Press Marketing» (China)
REV = «Review of Chinese Books» (China)
REVA = «Review of Arts» (China)
REVHE = «Revue d'Histoire Ecclésiastique» (Belgium)
REVM = «Review of Modern Writers» (China)
REVT = «Revista Transversos» (Brazil)
RF = «Review of Films» (China)

- RFL = «Research of Foreign Languages» (China)
 RFP = «Revue Française de Pédagogie» (France)
 RH = «Revista HISTEDBR-On Line» (Brazil)
 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)
 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)
 RSE = «Rivista di storia dell'educazione. Periodico del Centro Italiano per la Ricerca Storico-Educativa»; until 2013: NBC = «Nuovo Bollettino del Centro Italiano per la Ricerca Storico-Educativa» (Italy)
 RSHKE = «Revista e Shkencave Shoqerore» (Albania)
 RSI = «Rivista Storica Italiana» (Italy)
 RSR = «Rassegna Storica del Risorgimento» (Italy)
 RSS = «Research of Social Sciences» (China)
 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 = «Studi Storici» (Italy)
- SSC = «Social Scientist» (China)
- SSR = «Social Science Research» (China)
- SSS = «Shandong Social Science» (China)
- SSST = «Sign Systems Studies» (Estonia)
- 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 obucheniya i vospitaniya» (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 Küsimusi» (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 Gumanitarnyj Nauki» (Russia)
- VDOU = «Vospitatel' Dosholnogo Obrazovatel'nogo Uchrezhdeniya» (Russia)
- VESAP = «Vestnik Sankt-Peterburgskogo universiteta kultury i iskusstva» (Russia)
- VESGE = «Vestnik Gercenovskogo universiteta» (Russia)
- VESTU = «Vestnik Universiteta Rossijskoj akademii obrazovaniya» (Russia)
- VKTU = «Vestnik Kazanskogo tekhnologicheskogo universiteta» (Russia)

- VMGGU = «Vestnik Moskovskogo Gosudarstvennogo Gumanitarnogo Universiteta im. M.A. Sholokhova» (Russia)
- VMGPU = «Vestnik Moskovskogo Gorodskogo Pedagogicheskogo Universiteta. Serya Pedagogika i Psikhologiya» (Russia)
- VMUPO = «Vestnik Moskovskogo Universiteta. Pedagogicheskoe Obrazovanie» (Russia)
- VNES = «Vneshkol'nik» (Russia)
- VOB = «Voprosy Obrazovanya» (Russia)
- VOF = «Voprosy filosofii» (Russia)
- VOGPU = «Vestnik Orenburgskogo Gosudarstvennogo Pedagogicheskogo Universiteta» (Russia)
- VOR = «Vyshe Obrazovanie v Rossii» (Russia)
- VORS = «Vyshee obrazovanie segodnya» (Russia)
- VOSPIMLA = «Vospitanie i obuchenie detej mladshogo vozrasta» (Russia)
- VOSRAS = «Vospitatel'naya rabota v shkole» (Russia)
- VOSS = «Vospitanie v Shkole» (Russia)
- VOSSHKO = «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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