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*Transnational and transcultural educational
models in Eastern and Southern Europe
between XIX and XX Centuries*

edited by
Simonetta Polenghi and Vučina Zorić

Transnational and transcultural educational models in Eastern and Southern Europe in the XIX and XX Centuries. Foreword to thematic section of the issue

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ABSTRACT: Scholars from Central and South-Eastern European states present a series of research projects on transnational and transcultural educational models, using various examples from their countries in the XIX and XX centuries. These articles focus on the Czech Republic, Slovakia, Hungary, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Greece, Italy and Spain, to demonstrate how individuals, ideas and institutions became educational models in different cultures and nations, through a process of active reception, change and hybridization.

EET/TEE KEYWORDS: Transcultural; Transnational; Educational Models; Pedagogical Transfer; Education System; History of education; Europe; XIXth-XXth Centuries.

Traditional historical narratives are largely based on national history. At the same time, as a result of globalization, the idea that nationally-based histories are necessary but insufficient has been growing in importance, including in the field of History of Education.

At the 2015 ISCHE conference held in Istanbul, Eugenia Roldán Vera and Eckhardt Fuchs convened a Pre-Conference Workshop dedicated to *The Concept of the Transnational*. In 2019 they edited the first volume of the ISCHE series

«Global Histories of Education», with the same title¹. In their introduction, they underline the importance of language. The question of the translation of books and therefore of concepts is not a new one, but the historical nature of concepts remains a very important point. The ability of not only people but also ideas to travel beyond national boundaries makes the question of a transnational approach significant. When dealing with a supranational empire such as the Habsburg Empire, for instance, the imposition of the same pedagogical theory (e.g. Felbiger's or Milde's) in very different areas produced a homogeneous cultural policy but this could nonetheless be received and implemented in a variety of ways. A transnational approach is not just a comparative one, even though a comparative history of education is certainly indispensable and has now reached an advanced level². Transnational history, as Fuchs and Roldán Vera put it, «does not deconstruct the nation – it presupposes its existence, and it studies its development as a global phenomenon – but it contextualizes it in a set of translational relations, entanglements, and dependencies»³. These “entangled histories” are not easy and may present methodological challenges⁴, but allow us to answer new questions, using a greater number of tools. Colonialism has been a much-addressed topic in History of Education, particularly in the English, French and Belgian empires, and new research has been taking into account the mutual cultural hybridization, rather than merely passive reception, that took place⁵.

If some geographical areas have been more intensively researched, others have remained less so. Eastern and South-Eastern European countries are worthy of further research. Educational models (persons, ideals, institutions, books etc.) need to be addressed not only in terms of travelling from one nation to another, but also from one culture to another. To better examine the mutual exchange

¹ E. Fuchs, E. Roldán Vera (edd.), *The Transnational in the History of Education. Concepts and Perspectives*, Cham, Springer International Publishing, 2019.

² See R. Cowen, A.M. Kazamias (edd.), *International Handbook of Comparative Education*, Dordrecht etc., Springer, 2009.

³ E. Fuchs, E. Roldán Vera, *Introduction: The Transnational in the History of Education*, in Fuchs, Roldán Vera (edd.), *The Transnational in the History of Education*, cit., p. 11.

⁴ N.W. Sobe, *Entanglement and Transnationalism in the History of American Education*, in T.S. Popkewitz (ed.), *Rethinking the History of Education: Transnational Perspectives on Its Questions, Methods, and Knowledge*, Basingstoke, Palgrave Macmillan, 2013, pp. 93-107; J. Droux, R. Hofstetter (edd.), *Internationalisation in Education: Issues, Challenges, Outcomes*, special issue, «Paedagogica Historica», vol. 50, n. 1-2, 2014.

⁵ We just quote some very good examples, in a vast historiography: J. Goodman, G. McCulloch, W. Richardson, 'Empire Overseas' and 'Empires at Home': *Postcolonial and Transnational Perspectives on Social Change in the History of Education*, «Paedagogica Historica», vol. 45, n. 6, 2009, pp. 695-706; G. Ossenbach, M. d. M. del Pozo Andrés, *Postcolonial Models, Cultural Transfers and Transnational Perspectives in Latin America: A Research Agenda*, «Paedagogica Historica», vol. 47, n. 5, 2011, pp. 579-600; M. Depaepe, *Colonial education in the Congo - a question of “uncritical” pedagogy until the bitter end?*, «Encounters in Theory and History of Education», vol. 18, 2017, pp. 2-26; K. Christiaens, I. Goddeeris, P. Verstraete (edd.), *Missionary Education Historical Approaches and Global Perspectives*, Leuven, Leuven University Press, 2020.

in this process of reception, the articles in this issue are nearly always written by more than one author, and often by authors of different nationalities, and they deal with new and original topics. How did certain educational models travel? How were these pedagogical ideas/institutes adopted? How did their reception alter the original model? These are just some of the issues discussed in the research we present in this thematic issue.

Scholars from Central and South-Eastern Europe who have been working together for many years, sharing their points of view and results at various conferences on the History of Education, decided to explore more closely the transnational educational models in their states, a topic which had never before been addressed. This thematic issue of the journal presents the work of researchers in the field of educational history from the following countries: the Czech Republic, Slovakia, Hungary, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Greece, Italy and Spain.

The essence, characteristics and dynamics of the development of pedagogy and the school system in the newly-formed joint state of the Czechs and Slovaks in the interwar period are presented in the article by Tomáš Kasper (Czech Republic), Dana Kasperová (Czech Republic), Blanka Kudláčková (Slovakia) and Marek Wiesenganger (Slovakia) entitled *We are Building up Pedagogy and a School System: Educational Discussion in Interwar Czechoslovakia as Togetherness or Coexistence*. Their study focuses on the analysis of three levels of cooperation within the area of education in interwar Czechoslovakia: 1) the transfer of experience as part of the process of professionalizing teaching, and above all attempts to establish professional associations and teachers' organizations; 2) the transfer of the experiences of pedagogues With a reformist approach from the Czech to the Slovak environment; and 3) the transfer of intellectual concepts of pedagogy between ethnic Czechs and Slovaks in the academic pedagogical discussion. The authors point out that future research into this topic will need to focus to a much greater degree on the issue of clashes in the transfer of transnational comparisons in order to comprehend the dynamics of Czech-Slovak interwar life. And as the authors themselves say, transfer is never a one-way process in which the new is accepted in the very same way that it is "broadcast".

Tomaš Kasper (Czech Republic) and Edvard Protner's (Slovenia) contribution, entitled *Creating the New (Slavic) World through Education. A Comparison of the Educational Discussions between the Slovenes and the Czechs*, presents a whole complex of transfers of transnational and transcultural educational models between their countries during the last third of the 19th century and especially the interwar period. During that long period of time, the Czech Republic and Slovenia were part of the Austro-Hungarian monarchy, and then separated, one becoming part of Czechoslovakia and the other part of the Kingdom of Yugoslavia, but it turned out that these changes in the state borders and geographical distance did not prove to be limitations to their Slavic

proximity and culture. The authors analyze and jointly present the very intensive exchange of ideas and cooperation that took place in many fields, such as: pedagogical discussions on many issues of education and school reforms, and professional contacts between Czech and Slovenian teachers through individual cooperation and their associations, magazines, mutual visits and lectures, all of which had a significant impact on the development of pedagogical concepts and pedagogy itself as a science in both countries despite their numerous differences.

The significance and influence of Johann Friedrich Herbart on the development of pedagogy, education and schooling in Europe and the world is certainly not a historiographical mirage although his theoretical ideas and practice suffered numerous distortions, misunderstandings, and inadequate applications. In their article *Herbartianism as an Eastern Central European Phenomenon and its Reception in Hungary*, András Németh (Budapest, Hungary) and Béla Pukánszky (Szeged, Hungary) have attempted to demonstrate the general, common features of the reception of Herbartianism by reviewing the approach's success in Central and Eastern Europe in the 19th century. This research has strengthened and clearly established the thesis that Herbartianism as an official state pedagogy also played an important role in East Central Europe in the 19th century, both in the different regions as well as in the successor countries of the imperial and royal monarchy. It has been concluded that with the spread of the pedagogical theories of German Herbartianism in the different regions, it acquired a dominant position in the shaping and development of educational policy, in the construction of different school systems and in teacher training, and that Herbart's views determined the organizational framework of teaching, curricula, school subjects and textbooks. In addition, the example of Hungary as a case study shows that Herbartianism also played a decisive role in the instigation of Hungarian nation-state educational reform in the second half of the 19th century, as well as at the beginning of the 20th century, and that its Hungarian protagonists expanded their activities not only in the spirit of Herbartianism, but also in close contact with the German scholars who represented this direction.

Complexity characterizes the transnational and transcultural pedagogical transfers that occur not only between neighboring nations and states but also between those that are more distant. Dana Kasperová (Czech Republic) and Štefka Batinić (Croatia) in their article entitled *New school and education of new man in Zlín and Borovo – an example of a difficult pedagogical transfer* also focus on the interwar period. They highlight the then-characteristic search for the “new school” and the “new man” as a member of the “new society”, which went hand-in-hand with international cooperation and therefore also with an intensive cultural transfer of ideas between countries and patterns of reform. Their research is a case study of the transnational educational model of the formation of a “new industrial human being” in which the concept of rationalization was exported from the socio-economic to the educational field.

The article analyzes the options for transferring concepts of school reform and the company-led educational reform of the new industrial man from the town of Zlín (Czechoslovakia), which was dominated by the Bata shoe industry, to the so-called satellite company town of Borovo (Croatia in Kingdom of Yugoslavia). Although the transfer in all its complexity was clearly intentional, practical, influential and effective, it is evident that the implementation of this transfer was quite problematic, not straightforward, and the expected changes were not always realized as intended. The boundaries and limits of this transfer were determined mainly by the relatively different sociopolitical backgrounds of interwar Czechoslovakia and Yugoslavia and by their different contexts and experiences in discussing the focus of the educational sciences and the starting points for life reform and school reform in both countries.

Snježana Šušnjara (Bosnia and Herzegovina) describes an example of a significant individual who can be considered a transnational model of the National Histories of Education in the Balkans, especially in Croatia and Bosnia and Herzegovina, in her article *Miljenko Vidović, an educational visionary or inventive impostor?* Šušnjara's research provides a deeper and broader insight into the significance of the work Vidović undertook in his school, because in addition to educational reform ideas, he was also transferring ethical ideas from Europe and the USA. His attempt was to present a transcultural approach bringing 'new' pedagogical knowledge and educational inventions into existing school practice. Vidović's school for adults was also a phenomenon in the Balkans in the interwar period. His intention was to create a new kind of school, a school that contradicted the old conception of school and the ongoing pedagogical trends it entailed, and he investigated modern pedagogical achievements in Europe with the intention of including them in his working environment. Vidović's work is not only a pedagogical transfer between two countries or locally: he also promoted the ideas of pedagogical reform and his work was very well recognized outside his own country, in Europe and the United States where he had influential supporters within the ethical movement.

Montenegro, which also belongs to the Slavic peoples and which during the interwar period, like Slovenia and Croatia, was part of the Kingdom of Yugoslavia, was exposed, in common with numerous nations, to the influences of various pedagogical ideas and cultural and social models. However, from the last third of the 19th century, when Montenegro was an independent state, to the interwar period, there was one person who served as a transnationally and transculturally significant educational model common to Montenegro and Italy: the article by Simonetta Polenghi (Italy) and Vučina Zorić (Montenegro) deals with the topic of *Elena of Montenegro Queen of Italy: an educational model of woman from Cetinje to Rome*. The Montenegrin princess Jelena Petrović, who became the Queen of Savoy of Italy (1900-1946), was recognized during her lifetime as an exemplary and influential model of an educated woman, wife, "queen and mother". In their research, the authors of the article recall

her growing up in Montenegro, her education in Russia, and her subsequent life in Italy. Researching her popularized figure, the authors use visual sources, mainly the covers of popular weekly magazines, and articles from the national newspaper «Corriere della sera». The image of Elena as a charitable mother prevailed over her other qualities and by remaining faithful to her Montenegrin traditions and education she paradoxically managed to become an icon of “Italianness”.

Transnational and transcultural approaches refer to a historical narrative that transcends intellectual borders constructed in the context of national navel-gazing, paving the way for the study of the movement of influential actors and texts, educational ideas, and institutions across national boundaries. Analyzing such approaches Panagiotis Kimourtzis (Rhodes, Greece) and Ioannis Betsas (Thessaloniki, Greece) in their article *Perceptions and implementations of Froebelian pedagogy in the Greek education: A transcultural analysis* focus on a classic figure of the History of Education and his influence, especially in Greece: Friedrich Froebel. The authors problematize, analyze and present the significance and implementation of Froebel’s ideas within the framework of preschool education and in the foundation and development of kindergartens. In so doing, they take into consideration the ideas of other classic texts in the History of Education, as well as of important thinkers, and the context of the development of the Greek state from the time of the Ottoman Empire to almost the present day. The authors come to the conclusion that Greek-German cultural interaction intensified in the late 19th century, and that while kindergarten was a quasi-public institution for the Greek communities in the Ottoman state, in the Greek state itself the institutionalization of preschool education remained exclusively a private sector initiative.

Local cultural, linguistic and social traditions made the reception of Froebelian’s ideas a not particularly complex process, where for instance his works were not translated but presented in Greek through an interpretation. The modernization of the country, and religious and cultural views created a distortion, so that Froebel’s ideas were incorporated «as ahistorical and ‘natural’» to Greek society. Given this, a transnational perspective on new-institutionalism could shed light on critical aspects of the path-dependence of hybridization and the indigenization processes of pedagogical thought in Greek education.

The article by Giuseppe Zago (Italy) and Antonio Fco. Canales (Spain) titled *Gentile in Spain: an historiographical mirage* studies the influence of the great Italian educationalist and philosopher Giovanni Gentile in Spain. In the first part of the research, the authors analyze the main features of Gentile’s thought as well as the key reform that he implemented in Italy in 1923 as Mussolini’s first Minister of Education. In the second part, they focus on the limited influence of Gentile’s thought in Spain, both in the main pre-war pedagogical tendencies and in the educational policy and thought after the civil war. The authors conclude

that the seeming coincidence of the Spanish secondary school reform of 1938 with the Gentile Reform is purely superficial, since Spanish Catholicism had its own program of reform (primarily aimed at securing the interests of Church schools) whose goals were completely independent from Gentile's. Thus, the supposed influence of the Gentile Reform on the Spanish reform of 1938 is no more than a historiographical mirage.

The jointly researched topics provide a deep insight into the contribution of the process through which individuals, institutions and ideas have shaped the education, culture and societies of several countries. As much of the research was carried out in 2020, this issue has been complicated because it was partly realized under the conditions imposed by the coronavirus pandemic. It thus represents a kind of resistance to all possible restrictions and divisions, and constitutes a specific and symbolic unifying act of cooperation in the field of History of Education.

We are building up pedagogy and a school system: educational discussion in interwar Czechoslovakia as togetherness or coexistence?*

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ABSTRACT: The new Republic of Czechoslovakia demonstrated in its very name the connection between Czechs and Slovaks. The twenty years of the Czechs and Slovaks living together in a common state – from great expectations in 1918, the year the country was founded, to the bitter end of the collapse of Czechoslovakia and the emergence of the pro fascist Slovak state in 1939 and the Protectorate of Bohemia and Moravia – are an example

* This paper is supported by the contracts GACR No. 16-13933S The analysis of pedagogical concepts of school reform in interwar Zlín in the context of a model industrial company town and VEGA No. 1//0106/20 Freedom versus Unfreedom in Education in Slovakia in 1948-1989.v

of the attempt of two «brother peoples» to live together in the political, social, cultural and educational arenas. The following study reviews how coexistence in the pedagogical field in the interwar period enabled the transfer of pedagogical ideas and experiences between ethnic Czech and Slovak teaching staff.

EET/TEE KEYWORDS: Transnational transfer; Cultural transfer; Czech pedagogy, Slovak pedagogy; Interwar period; Czechoslovakia; XXth Century.

Introduction

Czechs and Slovaks belong to those nations that are brought together not just because their languages are very close to each other, but also and above all because of their experience of the common state they created together from 1918 to 1992 (with an interruption from 1939 to 1945). The subject of the following study is an analysis of three levels of cooperation between ethnic Czechs and Slovaks in the area of education in interwar Czechoslovakia: 1) the transfer of experience as part of the process of professionalizing teaching, above all attempts to establish professional associations and teachers' organizations; 2) the transfer of the experiences of pedagogues in a reformist vein from the Czech to the Slovak environment; and 3) the transfer of intellectual concepts of pedagogy among ethnic Czechs and Slovaks in the academic pedagogical discussion.

We are asking who endeavored to transfer experience and who received that transfer and how (the stakeholders). At the same time, we are reconstructing the conditions under which that transfer happened and whether it aided the acceptance of the aims and principles that were taken on board. It is, therefore, a question whether the aims of such transfer could ever have been fulfilled. We are interested in whether this was a transfer that changed the stakeholders on both sides or not, and why.

We comprehend *transfer* to be a natural component of discussions within a profession. Within such a framework, a transfer is “newly” conceived of as a challenge to the existing, valid order, “controlled” and “guarded” by a certain group of stakeholders. The “new” can be new only if it is a call for the reorganization of a given order, a transformation. Transfer is never a one-way affair during which the new is accepted in the very same way that it is “broadcast”. Such a perspective would negate the originality of the environment into which the different or the new arrives and, naturally, also the irreplaceability and uniqueness of the very stakeholders in the transfer on either side, both the “receivers” and the “transmitters”. Transfer is, therefore, always a dynamic process that depends on many givens, on the relationships operating in the environment from which the impulse arrives and in the environment that either accepts or rejects that impulse. A change of environment can, therefore,

constitute a challenge to the new environment if the contents of what is transferred are accepted as inspiration and assessed as feasible when it comes to addressing questions and problems. Transfer, therefore, means a modification of a state, not “just” acceptance. It cannot be explained in the categories of cause and effect¹, it is not a one-way handover of information. It happens, and stakeholders are aware of that as it is happening, it is consciously reflected upon by them, or at least subconsciously noted by them so that, at a certain phase, the transmission results in awareness of what is happening. We are, therefore, interested in the aims and expectations associated with transfer. At the same time, however, we are interested in the course of transfer and in deconstructing the constellations and relationships that support or weaken its acceptance or rejection, the following or the abandoning of certain aims². It is, therefore, apparent that any “new beginnings”, “historical breaks”, or “new epochs” will always involve both processes of continuity and of discontinuity³.

1. Czechoslovakia or Czecho-Slovakia: The historical context of Czechs and Slovaks in a common state

Czechoslovakia, according to the founders of this new state, was meant to be an example of Central European democracy and of the equal coexistence of several nationalities in a single state unit. These political and social ambitions were not easy to fulfill during the interwar period. Even though after Austria-Hungary and Germany lost the First World War, the international situation facilitated the breakup of Austria-Hungary and the creation of a new state unit in the center of Europe in October 1918, it is not possible to generally label the interwar period (which was significantly nationalized and sought solutions for the “crisis of the day” in authoritarian and totalitarian models for how to run society) as a time inclined toward the open development of new democracies.

Czechoslovakia, however, was not “just” weakened at that time by external international political conditions, but also by the complex nationality situation within the state. The multi-national state did not grow into a long-lasting, “natural” state unit of citizens who systematically espoused, in a long-term fashion, the “political project” called Czechoslovakia. The new state was a consequence of politicians calling for democratic politics and political

¹ See M. Caruso, T. Koinzer, Ch. Mayer, K. Priem (edd.), *Zirkulation und Transformation*, Köln, Weimar, Wien, Böhlau Verlag, 2013.

² See J. Schriewer, *Problemdimensionen sozialwissenschaftlicher Komparatistik*, in H. Kaelble, J. Schriewer (edd.), *Vergleich und Transfer. Komparatistik in den Sozial-, Geschichts- und Kulturwissenschaften*, Frankfurt am Main, New York, Campus, 2003, pp. 9-53.

³ See H. Kaelble, *Die interdisziplinären Debatten über Vergleich und Transfer*, in H. Kaelbe, J. Schriewer (edd.), *Vergleich und Transfer*, Frankfurt, Campus, 2003, pp. 469-494.

independence both in the Czech lands (Bohemia, Moravia, Silesia) and in Slovakia, which, according to the Czech representatives and some of the Slovak ones, could not be realized in the conditions of a monarchy and under Austrian/German “oppression” or Hungarian leadership. In that regard, both nations – Czech and Slovak – knew what the new state had to replace, namely, their remaining part of an entire constellation that from their perspective had not facilitated either their national or their political/civic development⁴. For Slovaks, moreover, the creation of a new state literally meant «saving the existence of both the Slovak nation and Slovak education»⁵. Through their assimilation policy, the ruling Hungarian elites had sought to transform Hungary into a Hungarian nation-state from the second half of the 20th century and to create a so-called united Hungarian nation. This was done through the assimilation of the non-Hungarian population, which affected Slovaks the most.

On the other hand, the common Czechoslovak state came into existence quickly and was somewhat unanticipated. Before the First World War broke out, almost nobody in either in the Czech lands or in Slovakia could have imagined that if the war were to end in a loss for Austria-Hungary and Germany, the «dream of the Czechs and Slovaks» for their independence as a state would be realized⁶.

As early as at the end of the 19th century and the beginning of the 20th century, the will of the Czechs and Slovaks to engage in common coordination in politics and in closer cultural collaboration could be seen. As part of the fading of national revival efforts, and as part of forming the modern Czech and Slovak nations, voices were heard recalling the cultural and linguistic closeness of the Czechs and Slovaks. These efforts were more nationally romanticizing than they were constructive politically, because both the Czechs and the Slovaks had many different experiences and «national features»⁷. We can see their significantly different developments prior to 1918 in several areas: in politics, economy, national-cultural issues and religion. Slovakia had been bound, historically and politically, to the Hungarian Kingdom, and its legislation, trade relationships, etc. were closely linked to the Hungarian lands. The Czech

⁴ A. Rajský, *Ideové pozadie a filozofické východiská dobového politického myslenia* [Ideological background and philosophical basis of contemporary political thought], in B. Kudláčová (ed.), *Pedagogické myslenie, školstvo a vzdelávanie na Slovensku v rokoch 1918-1945* [Pedagogical Thought, Schooling and Education in Slovakia, 1918-1945], Trnava, Typi Universitatis Tyrnaviensis, 2016, pp. 49-64.

⁵ B. Kudláčová, *Národné školství na Slovensku* [National education in Slovakia], in T. Kasper, D. Kasperová, D. Pánková (edd.), *Národní školství* [National Education], Praha, Academia, 2018, p. 125.

⁶ J. Rychlík, V. Penčev, *Od minulosti k dnešku: dějiny českých zemí* [From the Past to the Present: A History of the Czech Lands], Praha, Vyšehrad, 2018, p. 393.

⁷ For more information, see A. Bártlová, *Túžby, projekty a realita: Slovensko v medzivojnovom období* [Desires, Projects and Reality: Slovakia in the Interwar Period], Bratislava, Historický ústav SAV, 2010, pp. 71-72.

lands had followed Austrian legislation, and also their overall business and industrial interconnectedness had determined their significant position as an industrial superpower in Cisleithania. Declarations of religion and religiosity were also different for each nation: while Slovaks were traditionally a Christian (predominantly Catholic) nation, the relationship of Czechs to faith from the beginning of the 20th century was already quite tepid or reserved. Moreover, while the Czechs had undergone a strong re-Catholicization, they counted as the nation of the Hussites and the «rebels without religion», which in the eyes of Slovak Christians, and of Catholics above all, was not a «praiseworthy evaluation»⁸.

Another significant difference consisted of how citizenship and national identity had been built up for both nations after the Austro-Hungarian Compromise of 1867. The Slovaks had been strongly Hungarianized in the areas of culture, education, and social life, and their own national life had been subdued by the Hungarians in a long-term, relatively uncompromising way. Their national identity was maintained and developed by various cultural and political groups. However, they were given very little room in public and political life in Hungary to achieve their goals, and their representatives were often persecuted. In the Czech lands, on the other hand, after the adoption of the liberal constitution in 1867 there was a dynamic, successful development of Czech civil society and national society. The administration of national affairs had been, even after 1867, determined by the constant clashing of the Czechs with the numerically very strongly represented Czech Germans (Germans living in Bohemia, Moravia and Silesia) and was characteristic of their rather strong national competition and “combat” in the areas of culture, education, language and social life. Overall, however, these affairs were in the hands of the Czech political representation in many areas. As can be seen, both the Czech and Slovak nations belonged to the Slavs, but had very different historical experiences, and each group had only partial knowledge of the other’s experience.

In addition, the common Czech-Slovak political project meant the disruption of the territorial integrity of both Austria and the Hungarian Kingdom⁹. It is natural that before the war, Vienna could never have imagined losing the Czech lands, and Budapest similarly could never have imagined the loss of Upper Hungary (Slovakia). At the close of the First World War, the Slovaks argued on the basis of natural law when demanding separation from the Hungarian Kingdom¹⁰ and the Czechs based their demands for separation from Austria-

⁸ M. Zemko, *Školstvo vo vládnej a straníckej politike za prvej ČSR* [Education in government and party policy during the First Czechoslovak Republic], in E. Kázmerová *et alii*, *Premeny v školstve a vzdelávaní na Slovensku (1918-1945)* [Transformations in Schooling and Education in Slovakia (1918-1945)], Bratislava, Historický ústav SAV, 2012, pp. 55-70.

⁹ See J. Rychlík, *1918: rozpad Rakouska-Uherska a vznik Československa* [1918: The Breakup of Austria-Hungary and the Birth of Czechoslovakia], Praha, Vyšehrad, 2018.

¹⁰ This argumentation was not new. It was a repeated action, the political formulation of

Hungary on historical law (the independence of the Czech crown)¹¹. However, it was apparent there would be minimal acceptance of their demands by the political centers (Budapest and Vienna). During the course of the war, ideas and proposals about the postwar order were very diverse among the two nations.

The turbulence at the close of the war, the active policy of the Czech exiled political representation and their collaboration with exiled politicians from Slovakia, as well as the strength of their Czech and Slovak compatriots, especially those in the United States of America, meant the crystallization of the demand for Austria-Hungary to break up and an independent Czechoslovakia to be born¹². The union of the two nations was mainly for practical reasons: «The Czechs were to increase their numbers by adding two million Slovaks, and the Slovaks, by leaning on the Czechs, were to be able to better face the Hungarians»¹³. The choice of an alliance with the linguistically closest nation «appeared to be a pragmatic act by which the majority population of the ‘Czechoslovak nation’ would be established in the new territory»¹⁴, although in reality there existed many barriers to their common life as a nation and a polity.

The creation of the democratic Republic of Czechoslovakia in 1918, therefore, brought with it a burden that Austria-Hungary had already known¹⁵. The Cleveland Agreement spoke of a democratic, federal union of two equal nations – the Czech and the Slovak, which was insisted on by the Slovak foreign representation. However, the constitution adopted in 1920, unlike the previous international agreements, «expressed the principle of a single Czechoslovak nation, denying the Slovaks being a nation in their own right»¹⁶. However, the opinion platform embodied in the so-called idea of Czechoslovakism, represented by both the first Czechoslovak President Tomáš Garrigue Masaryk

which we can find already in the *Memorandum of the Slovak Nation* from 1861 and that was subsequently repeatedly confirmed in other documents.

¹¹ See J. Rychlík, 1918: *rozpad Rakouska-Uherska a vznik Československa* [1918: The Breakup of Austria-Hungary and the Birth of Czechoslovakia], cit.

¹² See D. Kováč, *Dějiny Slovenska* [History of Slovakia], Praha, Nakladatelství Lidové noviny, 1998. The political and constitutional wish for the unification of Czechs and Slovaks in one state was formulated in the Cleveland Agreement (1915) and then in the Pittsburgh Agreement (1918). See *Dokumenty slovenskej národnej identity a štátnosti I.* [Documents of Slovak National Identity and Statehood I.], Bratislava, Národné literárne centrum -Dom slovenskej literatúry, 1998, pp. 445-448 and pp. 485-486.

¹³ Rychlík, 1918: *rozpad Rakouska-Uherska a vznik Československa* [1918: The Breakup of Austria-Hungary and the Birth of Czechoslovakia], cit., p. 115.

¹⁴ A. Rajský, *Ideové pozadie a filozofické východiská dobového politického kontextu* [Ideological background and philosophical basis of the contemporary political context], in Kudláčová (ed.), *Pedagogické myslenie, školstvo a vzdelávanie na Slovensku v rokoch 1918-1945* [Pedagogical Thought, Schooling and Education in Slovakia, 1918-1945], cit., p. 52.

¹⁵ See J. Rychlík, *Češi a Slováci ve 20. století [1.], spolupráce a konflikty 1914-1992* [Czechs and Slovaks in the 20th Century, Volume 1, Collaboration and Conflicts 1914-1992], Praha, Ústav pro studium totalitních režimů, 2012.

¹⁶ M. Londák, S. Michálek, P. Weiss *et alii*, *Slovakia. A European Story*, Bratislava, VEDA, 2016, p. 21.

and by part of the Slovak political representation (Štefánik, Šrobár, Štefánek), was problematic to many Slovaks. The Czechs and the Slovaks were close, but they were not one nation. Their languages were very similar, but on the other hand, their cultural and societal traditions and their historical experiences were significantly different. They were not a nation as an “organic group” in the spirit of Herder’s philosophy, nor a nation in the political sense. The creation of Czechoslovakia was able to give a chance and room for that common idea, to push the Czechs and Slovaks to fulfill it together, so that the “re-melding” of the Czechs and Slovaks into the Czechoslovak nation in the political sense would happen¹⁷ without it meaning a loss of the national specificities of either the Czech or the Slovak side. However, such a situation was not established after the creation of Czechoslovakia and apparently was not even possible. This certainly was associated with ideas about its future development on both the Czech and Slovak sides. Many representatives of Czech politics were unable to rid themselves of the notion that Czechs and Slovaks are one nation and that Slovaks “just” speak a different form of the Czech language. The Slovaks therefore took the Czechs, very often, as an “older brother” constantly aiding and enlightening a younger brother who has to be properly grateful for the assistance¹⁸. In Slovakia, on the other hand, after their experiences with the Hungarian policy of expansion, voices began to again be raised calling for so-called autonomy, and among those voices, nationalist rhetoric accumulated power and significance. Simply put, the interwar issue of the Czech-Slovak question oscillated between the idea of Czechoslovak mutuality or Czechoslovakism (an integrated nation of Czechs and Slovaks), attempts at deeper autonomy and the federalization of Czechoslovakia¹⁹, and efforts for an independent Slovakia when the common state could not facilitate enough independent national development for the Slovaks.

It is not the aim of this study to research the levels and positions of Czech-Slovak relations in interwar Czechoslovakia. It is not at all our aim to assess the role of Czechoslovakia from the standpoint of Czech-Slovak politics; although we agree with a perspective that does not idealize the Czech-Slovak relationship within a common state, on the other hand, one can see in the newly-created Czechoslovakia an important opportunity for the democratic development of both Czechs and Slovaks’ lives and a “chance” for both nations to implement

¹⁷ See Rychlík, *Češi a Slováci ve 20. století [1.], spolupráce a konflikty 1914-1992* [Czechs and Slovaks in the 20th Century [Volume 1], Collaboration and Conflicts 1914-1992], cit., p. 39 and B. Ferenčuhová, *Československo v mezinárodní politice 20. roků* [Czechoslovakia in the International Politics of the 1920s], in B. Ferenčuhová, M. Zemko (edd.), *V mezivojnovom Československu: 1918-1939. Slovensko v 20. storočí* [In Interwar Czechoslovakia: 1918-1939. Slovakia in the 20th Century], 3 vols., Bratislava, VEDA, 2012, Vol. 3, pp. 59-92.

¹⁸ See M. Stehlík, *Slovensko: země probuzená: 1918-1938* [Slovakia, A Country Awakened: 1918-1938], Praha, Academia, 2015, p. 131.

¹⁹ See A. Bártlová, *Túžby, projekty a realita: Slovensko v mezivojnovom období* [Desires, Projects and Reality: Slovakia in the Interwar Period], cit., pp. 81-94.

the project of the Czechoslovak nation as a polity. Of course, it is appropriate to point out at this juncture that cultural (and therefore also educational) affairs in Czechoslovakia cannot escape the context of that polity and of society as a whole. If we are to briefly thematize the transfer of pedagogical ideas between the Czech and Slovak environments in interwar Czechoslovakia, the attempts at educational reform and the aims of the educators, it is impossible to do so without that context – quite the contrary. We are asking if that transfer was “encumbered” by the Czech-Slovak question or not, and whether the character of the transfer was rather just one of expertise related to a profession. We assume it was not. It is likely that the specifics of the transfer in a multinational state, at a time that was sensitive to issues of nationhood, were determined to no small degree by the national question and by its “baggage”.

2. The teacher as a “pillar” of the democratic Czechoslovakia

The “new” democratic Czechoslovakia was meant to be based on a democratic, modern school system, the basis of which was meant to be the “new teacher”, faithful to the Czechoslovak state²⁰. In July 1920 the first Congress of Czechoslovak Teachers was held in Prague, where the education program of the new state was formulated in a reformist spirit. It was not attended by ethnic German teachers, who convened their own Congress of German Teachers. Ethnic Hungarian teachers also did not attend the Congress of Czechoslovak Teachers, as their relationship toward the Czechoslovak state was considerably one of rejection. Although the Congress of Czechoslovak Teachers in 1920 demonstrated the determination of Czechs and Slovaks to reform both the external format of the school system and the internal format for running schools, it also allowed for the revelation of the very different experiences of each nation in the educational field and their ideas about the reform of the schools. Ethnic Czech teachers spoke at the Congress to a far greater extent, and they formulated its concluding resolution, which was meant to be adopted as a certain educational policy program for the coming period.

Ethnic Slovak teachers reported on the unsatisfactory condition of the schools in Slovakia which, after a phase of very strong Hungarization, now found themselves in a sad state. There was an absolutely *de facto* lack of general education at the high school level in Slovakia, and the education in

²⁰ Teachers who wanted to continue their pedagogical activities had to take the so-called official oath of teaching as a manifestation of their political loyalty to the new state and its laws. While many ethnic German teachers eventually took the oath and could remain in the teaching profession, most Hungarian teachers refused to pledge their loyalty to Czechoslovakia and preferred to leave Czechoslovakia (Slovakia) or to find another profession.

Slovakia of a vocational nature did not correspond to the country's economic needs. As of 1918, Hungarization had not just affected high schools, but folk education also, to a vast extent²¹. There was a lack of ethnic Slovak teachers (i.e., teachers who could speak Slovak and who had acquired their education at high schools in Slovak), there was a lack of Slovak-language textbooks, the material state of the school buildings and their equipment with teaching aids and other backup was unsatisfactory. The Slovakization of the schools, the unification of the school systems in the Czech lands and Slovakia, the rapid numerical growth of schools that were Slovak, and the abatement of illiteracy in Slovakia²², as well as the material and pedagogical-professional support for education in Slovakia became an important point of the program adopted by the Congress²³. The situation was meant to be addressed by the initial use of ethnic Czech educators in schools in Slovakia at all levels of schooling (folk education, secondary and vocational education, teacher training institutes, higher education)²⁴. The arriving ethnic Czech teachers, however, were

²¹ Since the Hungarian school legislation allowed teaching in the Hungarian language only, the Slovak language was taught only at some church-established schools. In 1918, out of a total of 3,641 public schools in Slovakia, there were only 140 Slovak-language schools (about 4%) and all 83 burgher schools were Hungarian; see *Slovenské školstvo v prítomnosti* [Slovak Education in the Present], Praha, Štátne nakladateľstvo, 1932.

²² Kázmerová says that as many as 34.9% of the population in Slovakia in 1910 was illiterate, unlike the Czech lands, where according to statistics just 2.4% of the population was illiterate; see L. Kázmerová, *Medzivojnové premeny školstva a kultúry* [Interwar changes in education and culture], in Ferenčuhová, Zemko (edd.) *V medzivojnovom Československu: 1918-1939. Slovensko v 20. storočí* [In Interwar Czechoslovakia: 1918-1939. Slovakia in the 20th Century], cit., p. 154.

²³ The growth in the number of schools in Slovakia (by 20% for folk schools and by 200% for burgher schools!) was continually underway until 1925 in particular, but also during the crisis in the economy until 1931. Despite the number of schools in Slovakia, they featured a higher number of pupils per school than elsewhere and the number of pupils in each classroom was higher than elsewhere. At the same time, the Slovak language was introduced quite rapidly as an instructional language if schools served to educate pupils whose mother tongue was Slovak. An important point was the building of modern schools in towns and villages. From 1924-1935 a total of 776 buildings were newly built for schools; see L. Kázmerová, *Medzivojnové premeny školstva a kultúry* [Interwar changes in education and culture], in Ferenčuhová, Zemko (edd.) *V medzivojnovom Československu: 1918-1939. Slovensko v 20. storočí* [In Interwar Czechoslovakia: 1918-1939. Slovakia in the 20th Century], cit., pp. 159-163. High schools were Slovakized after 1918, but the number did not rise as fundamentally in their cases as did the numbers of folk and burgher schools (from 46 schools in 1918/19 to 57 schools in 1937/38). Many of these, however, were modernized and compared to the 1918/1919 academic year, the number of high school students in 1937/1938 had been increased by 92%; see L. Kázmerová, *Riadiace orgány školstva a na Slovensku a vzdelávací systém v rokoch 1918-1945* [The governing bodies of education in Slovakia and the education system in the years 1918-1945], in L. Kázmerová et alii, *Premeny v školstve a vzdelávaní na Slovensku (1918-1945)* [Transformations in Schooling and Education in Slovakia (1918-1945)], Bratislava, Historický ústav SAV, 2012, p. 24. The number of ethnic Czech teachers at high schools in Slovakia was as many as 85% of all high school teachers by 1930; see Stehlík, *Slovensko: země probuzená: 1918-1938* [Slovakia, A Country Awakened: 1918-1938], cit., p. 91.

²⁴ The arrival of ethnic Czech employees in Slovakia in the field of state administration and

frequently visiting Slovakia for the first time in their lives and therefore did not know the conditions locally, which also brought about many tensions between the ethnic Slovak population and the ethnic Czech teachers, and in the future would cause problems with the employment of the newly-graduated Slovak teachers²⁵. Another point on the program of the Congress in 1920 was the requirement that a central educators' organization be created with sufficient strength and support to advocate for the requirements of teachers (not just in terms of their professional standing, but also their requirements with respect to educational policy and the profession as such). This was *de facto* an apparent sign of the professionalization of teaching in its so-called beginning phase²⁶, when the creation of associations and organizations was meant to aid advocacy for "elite" management (a monopoly of professional teachers), conceived both in expert institutions of a non-academic nature and at universities. The Association of Czechoslovak Teachers (*Československá obec učitelská*, hereafter ČOU)²⁷, which was the umbrella organization for the otherwise independent associations of ethnic Czech and Slovak teachers, respectively, was meant to aid with implementing the successful enforcement of the requirements of these

the economy was resolved by a law of October 1919 which allowed civil servants, i.e., including teachers, to be ordered to work anywhere in the Republic. The assignment of ethnic Czech teachers to various workplaces in Slovakia as well as their transfer was performed by the School Department in Bratislava; see N. Krajčovičová, "*Českí zaměstnanci v štátných službách na Slovensku v prvních letech po vzniku Československa*" [Czech employees of state services in Slovakia during the first years after the birth of Czechoslovakia], in J. Valenta (ed.), *Československo 1918-1938. Osudy demokracie v střední Evropě* [Czechoslovakia 1918-1939: The Fates of Democracy in Central Europe], 2 vols., Praha, Historický ústav AV ČR, 1999, Vol. 1, pp. 179-184. According to Kázmerová, in 1921 there were 1423 Czechs, 4283 Slovaks, 2290 Hungarians, 508 Germans, 173 Russians and 316 Jews in education in Slovakia; see Kázmerová *et alii*, *Přeměny v školství a vzdělávání na Slovensku (1918-1945)* [Transformations in Schooling and Education in Slovakia (1918-1945)], cit., p. 16.

²⁵ In the 1930s, Slovakia gradually established its own intelligentsia as well as teachers, who, however, could not find jobs in the already full education labor markets. Those jobs were "filled" with Czech employees and teachers, many of whom had settled permanently in Slovakia and started their families. For a closer handling of the issue of ethnic Czech teachers in the Slovak schools, see P. Matula: *Českí stredoškolskí profesori na Slovensku 1918-1938* [Czech High School Professors in Slovakia 1918-1938], Prešov, Vydavateľstvo Michala Vaška, 2006 and *Čechoslovakizmus na slovenských stredných školách 1918-1938* [Czechoslovakism at Slovak High Schools 1918-1938], Bratislava, Goralinga, 2013; as well as J. Zacharová, *Misia českých učitelův na Slovensku v letech 1918-1939* [The Mission of Czech Teachers in Slovakia in the Years 1918-1939], Žilina, Žilinská univerzita, 2014. These publications document a very broad range of views about the ethnic Czech teachers' aid, which is far from black and white, but consists of a broad mosaic of positive and negative stories, either on the part of the seconded Czech teachers or on the part of the receiving Slovak stakeholders.

²⁶ H.J. Apel, K.P. Horn, P. Lundgreen, U. Sandfuchs, *Professionalisierung pädagogischer Berufe im historischen Prozeß*, Bad Heilbrunn, Klinkhardt, 1999.

²⁷ The ČOU issue is reviewed in detail by the co-author of this study, D. Kasperová, *Československá obec učitelská v kontextu reformy vzdělávání učitelů (ŠVSP) a reformy školy* [The Association of Czechoslovak Teachers in the Context of Reform for Teacher Training (School of Higher Education in Pedagogy) and Reform of the Schools], Praha, Academia, 2018.

teachers on the question of reforms to education and the schools. The ČOU was created after the Congress, in 1921. If we analyze the discussion of the ethnic Czech and Slovak teachers published in the pages of the journal of the umbrella organization (*Věstník ČOU*), we find that while ethnic Slovak teachers may have formally joined the ČOU, and the numerically strongest Slovak Teachers Union joined²⁸ the ČOU as well, the direction and program of the discussion was determined to a much greater degree by the ethnic Czech stakeholders (academic and scholarly elites of pedagogy as well as teachers). This was the case when it came to the subjects of reforming teacher training, external reform of the school system, internal reform of the running of schools and the ways they provided instruction, questions of establishing reforms to education and the nurturing of children based on the findings of modern pedagogical scientific surveys, or the issue of co-education, the position of the profession of teaching, independence of schools from the Church, and the position of female teachers.

If we ask why a significant portion of the ethnic Czech teachers had to very quickly leave the schools in Slovakia during what was a crisis period, politically – after the detachment of the border territories and the disintegration of Czechoslovakia following the signing of the Munich Agreement in the autumn of 1938 – what we find is that the reasons for those departures indicate that different, generally persistent perspectives were held about the schools in the Czech environment compared to those in Slovakia. It is likely that the ethnic Slovak teachers and the public in Slovakia did not accept the aims of some directions of the ethnic Czech teachers as their own, they did not identify with them – on the contrary, they felt them to be a rather foreign “element” in their “culture of schooling”. Co-education, weakening of the Church influence in the schools to such a degree as to eliminate it altogether, a strong emphasis on the academic, frequently positivistic establishment of a pedagogy exempt from the traditional principles of child-rearing that flowed more from cultural customs than from scholarly conclusions – none of this was anything like the experiences in the schools in Slovakia prior to 1918.

Part of the political scene in Slovakia (Agrarians, Social Democrats) and some teachers may have supported the requirements of the teachers arriving from Prague, especially their moderate reformist versions, but they were not the group that was the strongest. The transfer of the Czech education program happened in Slovakia just among some teachers, with the support of leading representatives of educational policy in Slovakia as well as ethnic Czech teachers located in Slovakia who “fulfilled” the function of “activators”. Slovak teachers identified in just a lukewarm way with the dominant message of the experimental, modern pedagogical and psychological education sciences/child studies, both within the framework of the activity of the ČOU’s own institute

²⁸ This association was largely made up of Czech teachers in Slovakia, as well as the so-called progressive teachers who accepted reform ideas coming from the Czech environment.

for research and within the framework of academic research as the basis of educational reform. While the ČOU responded to contemporary problems of a social nature in the areas of child-rearing and education with left-wing prescriptions and programs, ethnic Slovak teachers during the course of the 1930s were living under the influence not of the Social Democratic wing, but under the perspective that was Christian, conservative, and nationalist when it came to social issues and addressing challenges of a social nature²⁹.

A complex situation also arose when it came to the perspective on the direction and implementation of educational reforms for teacher training at universities, a requirement voiced by both ethnic Czech and ethnic Slovak teachers that became the subject of many motions for reform and activities of the ČOU. After lawmakers in the Czechoslovak Parliament were not inclined to adopt a law mandating the college education of the nation's schoolteachers, the ČOU established its own preparatory courses that featured lectures and seminars delivered as if they were taught at universities. This was a certain *de facto* form of providing continuing education to teachers, as the courses did not serve any qualification role. Teachers were able, at their own expense and in their own free time, to attend Saturday and Sunday courses designed to educate them at a university level in Prague and in Brno (and later in other cities) that were led by eminent experts in pedagogical and psychological research from the universities in Prague and Brno. In addition to experimental pedagogy and experimental psychology, lectures were given on the biology of the child, "social hygiene", the sociology of youth, and on contemporary didactic theory and the findings of research about didactics in the profession. Both academic staff members and practitioners from experimental reformist schools lectured in these series. The so-called School of Higher Education in Pedagogy (*Škola vysokých studií pedagogických* – ŠVSP, established in 1922), within the framework of the ČOU, played an irreplaceable part, therefore, in defining the pedagogical program of reforming the schools and preparing a large number of teachers for pedagogical reform and experimental work (which is the next area of our study). What is more, the ŠVSP had its own experimental pedagogical institute for research and therefore «was to have been a guarantee of scholarly research in pedagogy and the systematic academic education of teachers»³⁰. The establishment of a ŠVSP in Bratislava was discussed within the ČOU beginning in the 1930s, but never managed to be carried through, as archival background materials document. Although in the case of the ŠVSP the concept was extremely modern on preparing teachers, as it connected research

²⁹ M. Zemko, *Školstvo vo vládnej a stránickej politike za prvej ČSR*, in Kázmerová *et alii*, *Premeny v školstve a vzdelávaní na Slovensku (1918-1945)* [Transformations in Schooling and Education in Slovakia (1918-1945)], cit., pp. 82-87.

³⁰ Kasperová, *Československá obec učiteľská v kontextu reformy vzdelávania učiteľů (ŠVSP) a reformy školy* [The Association of Czechoslovak Teachers in the Context of Reform for Teacher Training (School of Higher Education in Pedagogy) and Reform of the Schools], cit., p. 226.

and the theoretical discussion of pedagogy with ŠVSP students participating in observation and practicums at experimentally oriented schools, ČOU never managed to convince a larger number of ethnic Slovak teachers to support this institution. This model of continuing education for teachers did not find its way into the environment of Slovakia during most of the 1930s. It was not until the autumn of 1937 that ethnic Slovak teachers managed to establish a similarly oriented educational institution under the Slovak Pedagogical Society. It seems that self-education for teachers as implemented in the Czech lands was not considered as urgent in Slovakia as it was in the Czech environment. During the first years of the founding of Czechoslovakia, it was not the further development of teachers' education that was the issue in Slovakia, as there were no teachers there yet to develop further; this different outcome, therefore, was not about conceptual differences regarding the form of modern teacher training, but about what actually was a different level of quality in the teaching environment in Slovakia.

3. *The «New School» and «New Education» in democratic Czechoslovakia*

Both prior to 1918 and after the birth of Czechoslovakia, reform of the schools represented an essential subject of the Czech discussion on pedagogy. The existing program for reform of the schools did not change after 1918 from a pedagogical principles' standpoint. What changed was the political and social situation, and at the same time, differentiation happened within the movement for reform. Ethnic Czech teachers anticipated the fast implementation of their pedagogical reform requirements and the adoption of a new law on the schools in the spirit of republican schooling³¹, which was meant to guarantee access to education in a more democratic way by pupils, as well as a format that would be modern, «especially instruction focused on individuality and pupil specifics, supported by the active or so-called working method and the development of the elements of so-called active school democracy»³². However, the politicians did not fulfill ethnic Czech teachers' expectations, and even 10 years after the birth of an independent state, a new law on the schools adjusting the format of the school system and anchoring the active instruction model in that system had yet to be adopted. That led a significant part of the ethnic Czech teachers to

³¹ For more information, see M. Wiesenganger, *Mravná výchova v štátnom národnom školstve na Slovensku v rokoch 1918-1939* [Moral Education in Nationwide Public Education in Slovakia in the Years 1918-1939], Trnava, Typi Universitatis Tyrnaviensis, 2017.

³² T. Kasper, *Reforma školy jako součást reformy společnosti* [The reform of a school as a component of the reform of society], in T. Kasper, D. Kasperová, „Nová škola“ v meziválečném Československu ve Zlíně - ideje, aktéři, místa [The «New School» in Interwar Czechoslovakia in Zlín - Ideas, Actors, Places], Praha, Academia, 2020, p. 38.

quickly define and draw up their own program for the reform of the schools in 1928. This happened within the framework of discussions among experts in the ČOU organization, which represented teachers, where in 1928 the Commission on Reform of the Schools was established. That body adopted a Program for Reform of the Schools in 1929 and asked the Education Ministry to allow it to be carried out at chosen experimental schools. The ministry, at the beginning of the 1929/1930 school year, agreed and allowed the chosen schools to open a program in the reform spirit for the primary and lower secondary grades. How was the program built? In the ČOU, the program for reform of the schools was not “just” based on the domestic pedagogical tradition and the experiences of reformist teachers in critically reflecting on that tradition. To a large extent, it was also based on ethnic Czech educators’ long-term stays at American universities and their experiences of the richness of the studies there, especially at Columbia University’s Teachers College in New York³³. There they were guided in the spirit of «American behaviorism, pragmatism and experimentally and quantitatively oriented pedagogy and psychology overall»³⁴. They identified with this stream and some were inclined toward the “charm” not just of methodologies for pedagogy based on quantitative approaches, but also the “charm” of notions about the American course of democracy as modern and the principles of so-called scientific management that were enforced not just in the economic arena, but also in many social and societal aspects of the state. Czechoslovakia became one of the centers of scientific management in Europe during the 1930s. Congresses of global companies advocating the principles of scientific management and ideas about the technocratization of society were held there. After 1928, the main representatives of Czech education reform who were lecturing in the ČOU courses, and more broadly, the professional teachers who were open to questions of reforming the schools, became conceptually convinced that «social progress can be planned and supported in the spirit of scientific management principles»³⁵. In addition to «belief in the exact measurement of the personality of the pupil and the formulation of the laws of learning on a scientific basis»³⁶, ethnic Czech teachers did their best to create room for active

³³ These were several years of stays by leading professors and associate professors of pedagogy from Charles University in Prague and Masaryk University in Brno in the years 1914–1930, e.g., Karel Veleminský, Břetislav Foustka, Václav Příhoda, Jan Uher, František Pražák, Stanislav Velinský, Otakar Matoušek, Stanislav Vrána.

³⁴ T. Kasper, *Pedagogická věda ve „službě reformy školy a reformy společnosti“* [Pedagogical science in ‘the service of the reform of the school and the reform of society’], in Kasper, Kasperová, Pánková (edd.), *Národní školství* [National Education], cit., p. 261

³⁵ D. Kasperová, *Výchova průmyslového člověka a firma Baťa v meziválečném Zlíně* [The Education of Industrial Man and the Baťa Company in Interwar Zlín], Liberec, Technická univerzita, 2014, p. 49.

³⁶ T. Kasper, D. Kasperová, *Development and Focus of Czech Pädagogik in the Late 19th and Early 20th Centuries*, in B. Kudláčová, A. Rajský (edd.), *Education and “Pädagogik” – Philosophical and Historical Reflections (Central, Southern and South-Eastern Europe)*, Berlin,

problem-solving by using the techniques of learning by doing, and applying school democracy. That was also determined by the ČOU program, which held a broader discussion of reform, organized observations in reformist schools, and supported insight into the principles of the reform of schools within the ŠVSP. Despite this, the program for reform of the schools could not avert many critical reactions from ethnic Czech teachers and other reform representatives (especially from Brno, where an educator group at the university was embodied by the figure of Professor O. Chlup and the exceptional Professor J. Uher, as well as Professor J. Hendrich in Bratislava). They reflected other streams in the movement for a «new school and new education» and pointed out the limits of optimism about reforms based on scientific management in the social sphere. At the same time, the Christian, conservatively oriented teachers negatively read both the academic orientation of the pedagogical program for reform (with its emphasis on measurement referred to as a simplified penetration into the “essence” of man, i.e., an explicitly positivist thesis strongly rejecting religion, the idea of progress), and its character as a reform based in social democracy. Although the advocates of the program of reforming the schools faced rather sharp criticism in the Czech lands (they were labeled “Americans” ignorant of the Czech pedagogical tradition), the number of reformist schools there grew in the 1930s quite rapidly, as did the press oriented toward pedagogical reform, while lectures reflecting the practical experiences and theoretical principles of reformist teachers supported the main principles of reforming the schools to a significant degree. New curricula for primary and lower secondary schools published after 1933 anchored these approaches to pedagogical reform in many important respects within the approved curricula used in the Czech lands for instruction overall.

The ideas of the reform pedagogical movement and the idea of differentiated schools in Slovakia that would be unified were implemented with a certain delay compared to the Czech lands. They spread mainly through educational magazines, personal contacts with ethnic Czech reform teachers (many of whom were assigned to work in Slovakia) and later by excursions and visits to Czech experimental schools and participation in conferences of reformist teachers. The first experimental schools in Slovakia were established three years after the ones in the Czech lands (1932/1933)³⁷. The activity of reform was concentrated around F. Musil, the “pupil” of V. Příhoda³⁸. Musil arrived

Peter Lang, 2019, p. 203.

³⁷ From a geographical point of view, experimental schools were established both in western Slovakia (Trnava) and in the eastern part of the country (Košice, Prešov).

³⁸ B. Kudláčová, *Trnava a trnavský región – centrum reformného pedagogického hnutia na Slovensku* [Trnava and the Trnava Region – the center of the movement for pedagogical reform in Slovakia], in M. Pánková, D. Kasperová, T. Kasper (edd.), *Meziválečná školská reforma v Československu* [Interwar Reform of the Schools in Czechoslovakia], Praha, Academia, 2015, pp. 271-286.

from the Czech lands after the establishment of the new state and worked in Slovakia, first as a professor at the Institute for Teachers in Bratislava and subsequently as a school inspector³⁹. From that position, he had an important influence on developments, including the reform of schools in Slovakia. Musil established the journal *Naša škola* [Our School], which was a platform for reformist thought in Slovakia (published from 1926-1939). Along with support for those aligned with reform among the Slovak teaching community, as well as lectures by the “leaders” of reform in the schools from the Czech lands, or the observation visits organized for pedagogues interested in educational reform in the reformist schools in the Czech lands and Slovakia, we can also discuss the flourishing of «reformist school tourism» among such teachers. It is possible to speak of an interest in reform in Slovakia that was relatively strong, even if it was no “passion” for reform. As in the Czech lands, the principles of reforming the schools in Slovakia were subjected to critique and associated with left-wing streams of thought, especially social democracy. Ideas of a positivist reform of the schools, as well as the reform of society or the so-called reform of “man” could not strike a chord either with the Christian/social ideals that were greatly supported by Slovak teachers and widespread among them, or with the so-called Slovak cultural pedagogical stream. The program for reform of the schools, as conceived of within the framework of the ČOU in the Czech lands, was therefore unable to deeply intervene in the events involving reform of the schools in Slovakia.

Pedagogues and teachers in Slovakia perceived a strong need for the development and reform of education. This was the basis of their fundamental openness to Czech initiatives for new pedagogical reform. However, the strong anti-religious principles in the Czech directions oriented toward a pedagogy that was positivist, as well as their promotion of the purely empirical character of such pedagogy – these aspects were fundamentally problematic in Slovakia. Another major problem was the already-mentioned power dimension of this transfer, which in practice often meant the introduction of some reforms through legislative regulation without sufficient prior discussion of them with the profession and the public. It was expected that it was possible to skip the phase of dialogue and discussion that the Czech side had already gone through, that such dialogue in Slovakia was less important than the interests of the Republic as a whole. However, this caused the opposite effect for some groups of Slovak teachers, namely, closing down discussions of topics that they themselves had considered necessary to open.

³⁹ For more information, see E. Lukáč, *Reformné pedagogické hnutie v období ČSR a jeho prejavy na Slovensku* [The Movement for Pedagogical Reform in the Czechoslovak Period and its Manifestations in Slovakia], Prešov, FF PU, 2002, and B. Kudláčová, *National Character of the Educational Reform Movement in Slovakia in the Interwar Period*, «History of Education & Children’s Literature», vol. X, n. 1, 2015, pp. 317-337.

4. *Academic pedagogy as a space for the transfer of ideas and perspectives?*

In the analysis of the transfer of ideas and perspectives between ethnic Czech and ethnic Slovak pedagogical representatives, several aspects must be considered, as the developments up to 1918 had allowed the Czech and Slovak pedagogical traditions to influence each other just minimally. A fundamental aspect that not only affected pedagogical transfer, but directly created room for it, was the very existence of the common, new, “republican” framework for issues of pedagogy and problems of an educational, scientific and scholastic character.

However, the pedagogical transfer that began immediately after the establishment of the Republic was marked not just by the fact that the development of pedagogy as a science was in itself a very confrontational, differentiated process, especially in Czech pedagogy, but at the same time was a process closely connected with the institutionalization of pedagogy and also with the interconnection of the results of pedagogical science with reform of the schools. The perspective of a transfer based on dialogue and inspiration was thus burdened with ideas promoted by the state, such as republican democracy, Czechoslovakism, and secular rationality. Academic discourse was thus formed by the “higher interest of the state”: the establishment and defense of the new order of the state and the organization of society. This aspect of power, when it was applied to staffing the newly-emerging educational and pedagogical institutions by those with an unequivocal preference for «Czechoslovakist» opinion, negatively affected scientific transfer itself, as the power of the state entered the discourse of science by marginalizing the opinions and perspectives of those who were not of a «Czechoslovakist» orientation or indeed, not of a nationalist orientation of any kind.

Another very important factor of this pedagogical transfer was the fundamentally different state of pedagogy and the representation of those practicing it in the Czech lands compared to Slovakia. While on the Czech side pedagogical science had undergone significant development, moving from Herbart's positions towards those of empiricism, positivism or pragmatism even before the establishment of Czechoslovakia, academic endeavor at Slovak universities after 1918 was in a state of having largely been delayed due to Hungarization⁴⁰ and remained mainly in its nationalist and religious positions without moving in any special direction toward the establishment of pedagogy as a science. The exception were ethnic Slovaks living and studying outside Slovakia, frequently emigrants fleeing the Hungarization policy⁴¹. The fact is

⁴⁰ E. Kázmerová, *Medzivojnové premeny školstva a kultúry* [Interwar changes in education and culture], in Ferenčuhová, Zemko (edd.), *V medzivojnovom Československu: 1918-1939. Slovensko v 20. storočí* [In Interwar Czechoslovakia: 1918-1939. Slovakia in the 20th Century], cit., p. 167.

⁴¹ For more information on the development of pedagogical science in Slovakia and the

that in Slovakia there were no candidates for a pedagogical professorship who would have fulfilled both the criteria of espousing the policy of the state and the criteria of the profession⁴².

Not only the state of Slovak pedagogy, but also the focus of the Government in the educational field (V. Šrobár, A. Štefánek) on filling academic and teaching positions with Czechoslovak, republican-oriented personalities, led to the fact that Bratislava University's newly-established Pedagogical Seminar was staffed in 1923 by Professor Otokar Chlup, an ethnic Czech. However, this ultimately contributed to the unprecedented development of pedagogy in Slovakia and to the opportunity for academics to be educated as the next generation of ethnic Slovak staff. The fact is that pedagogy in Slovakia as an academic discipline was developed overwhelmingly from the position of the «Czech discussion and experience».

The above-mentioned Pedagogical Seminar, as «the first academic institution concentrating on the development of pedagogical science and teacher training in Slovakia, was literally dependent on the help of Czech professors»⁴³ and its structure copied that of Charles University's Pedagogical Seminar in Prague. Pedagogy was taught at Bratislava University until 1938 by professors from Brno and Prague – Otokar Chlup (in 1923-1927), Josef Hendrich (in 1927-1938) and Jan Uher (in 1937-1938). They newly⁴⁴ opened up a perspective for Slovak students, not just on the classic disciplines of pedagogy, but also on current global pedagogical thought, and gave them an insight into the dispute over the focus of pedagogy as an exact science versus «philosophical» pedagogy, including that what was crucial for that new direction, as well as for

reception of global pedagogical thinking in pedagogy there, see M. Krankus, *Recepcia svetového pedagogického myslenia v slovenskej pedagogike* [The reception of world pedagogical thinking in Slovak pedagogy], in Kudláčová (ed.), *Pedagogické myslenie, školstvo a vzdelávanie na Slovensku v rokoch 1918-1945* [Pedagogical Thought, Schooling and Education in Slovakia, 1918-1945], cit., pp. 86-116.

⁴² Many representatives of the «pre-coup» intelligentsia did not clearly identify with the Czech lands and Slovakia uniting, or rather, with a republican solution after 1918. An important criterion by which they assessed the newly formed Republic was their national point of view, whether the new arrangement of the state would allow for the development of the Slovaks on their own terms. The common state with the Czechs was just one alternative out of several for them, which was considered controversial in the extreme later on. For example, Ján Kvačala, a European-style, prominent teacher, was not considered acceptable after 1918 because he had «proposed the accession of Slovakia to Russia». (L. Bernát, *Ján Kvačala a Jozef Škultéty vo svetle vzájomnej korešpondencie* [Ján Kvačala and Jozef Škultéty in the light of their mutual correspondence], «Historicko-pedagogické fórum», vol. III, n. 2, 2014, p. 36).

⁴³ B. Kudláčová, *Pedagogy as Part of University Education in Slovakia – Historical and Contemporary Perspective*, «Historia Scholastica», vol. 3, n. 1, 2017, p. 6.

⁴⁴ Pedagogy in Slovakia had taken in the thought of European figures and movements in pedagogy since the 18th century. In advance of the birth of Czechoslovakia, an appreciable decline in this openness was caused by the decades of Hungarization in Slovakia (1867-1918); see J. Čečetka, *Zo slovenskej pedagogiky* [From Slovak Pedagogy], Turčiansky sv. Martin, Matica Slovenská, 1940.

the disciplines being newly shaped in pedagogy, such as educational psychology and sociology. From the perspective of the direction of pedagogy in Slovakia, it is important that «the above-mentioned three Czech professors were characterized by a tendency towards philosophically oriented pedagogy and a critical view of quantitatively oriented pedagogical directions and pedagogical pragmatism»⁴⁵, strongly promoted by a part of the pedagogical profession in the Czech lands at that time.

Of the three professors mentioned, Josef Hendrich had the greatest influence on pedagogy in Slovakia. Not only did he bring «Czech pedagogy» to Slovakia, but he also supported ethnic Slovak figures in pedagogy and was interested in the concepts of pedagogical thought developed in the environment of Slovakia, both contemporary and historical ones, and pointed out their timeless value⁴⁶. He thus continued the historiography of pedagogy in Slovakia, which, however, he raised to a new level by means of his scientific approach. An important fact is that through his lectures on the history of pedagogy in Slovakia, he appreciably aided the formation of the identity of pedagogy there. Hendrich's influence was also strengthened by the fact that his pedagogical position was rooted in those movements in pedagogy that were spiritually oriented, featuring a dimension of religious sensitivity which cohered considerably with the pedagogy of the pre-1918 Slovak tradition. In addition to his crucial influence in the development of pedagogical theory, Hendrich also played a distinguished role in knowledge (theory) transfer between teachers. This was not just about the education of promising secondary school teachers (the Pedagogical Seminar), but also nationally raising the training of teachers by establishing the two-year Pedagogical Academy in Bratislava (1930), where secondary school graduates could augment their education to become teachers at the so-called folk schools. Last but not least, it is necessary to state that it was the figure of Hendrich who influenced the academic career development, in pedagogical psychology, of Bratislava's first pedagogy professor, Juraj Čečetka.

It can be stated that both the figure of the first pedagogy professor in Slovakia, Juraj Čečetka, as well as the interwar generation of pedagogues and teachers there, were fundamentally influenced by Czech pedagogy, especially by the conceptual current of reform represented by Hendrich, Chlup and Uhr. This opened up new horizons for pedagogical approaches, questions and solutions in Slovakia. Related to this is the fact that part of the Slovak teaching

⁴⁵ B. Kudláčová, *Počiatky pedagogiky a pedagogického diskurzu* [The beginnings of pedagogy and pedagogical discourse], in Ead. (ed.), *Pedagogické myslenie, školstvo a vzdelávanie na Slovensku v rokoch 1918-1945* [Pedagogical Thought, Schooling and Education in Slovakia, 1918-1945], cit., p. 71.

⁴⁶ J. Hendrich, *Ako sa kedysi na Slovensku študovalo* [How Studying Used to Take Place in Slovakia], Turčiansky sv. Martin, Matica Slovenská, 1937.

profession adopted the program of the experimentally and pragmatically oriented movement of reform relatively quickly⁴⁷.

Conclusion

Czechoslovakia turns out to have been a multinational state unit, the stability of which would fall or rise according to how the members of each nation inhabiting its territory and developing its civil society managed to accept it. Czechoslovakia was aware of the role of the schools, which were meant to educate and raise citizens in a democratic-ideological spirit (civics education and studies was introduced as a new subject, and civic education was emphasized in many other instructed subjects) and according to active instruction principles respecting the individuality of the pupil and cultivating the pupil's awareness of social solidarity in the spirit of the already-mentioned tolerance of opinions, politics and religions. In that regard, this was quite a modern, open program of educational policy for a state to have, one based on faith in the ideals of cosmopolitanism, on respect for human beings and their individuality. Despite this, the discussion of pedagogy by each nation in Czechoslovakia, as well as the schools themselves, never managed to be brought under a common program, and teachers never managed to join a nation-wide, multiethnic organization in their profession that would become the sole such organization. As in the area of politics, there was never any deeper, more permanent reflection among the representatives of the teaching profession on the specific givens and opportunities of their discussions of education and pedagogy.

In the case of ethnic Czechs and Slovaks, the transfer of experience and ideas in creating a program for teachers, or a program for reform of the schools, or how the discussion among pedagogical professionals was profiled, was limited to the degree in which the Czech or Slovak discussions remained closed to voices reflecting on the principles on which they were basing their specificity. An essential segment of the ethnic Czech teachers had faith in the power of empirical, quantitatively oriented pedagogical research and managed to also strike a chord with the principles of scientific management and its ability to modernize and reform society. That segment, therefore, very often did not manage to appreciate the importance of pedagogy in the Slovak tradition, which had been subjected to the dominant influence of positivism at the close of the 19th century and which rejected seeing education and its essence in modern times as "just" pedagogical prescriptions for a quantitative orientation or in

⁴⁷ For more information, see E. Lukáč, *Reformné pedagogické hnutie v období ČSR a jeho prejavy na Slovensku* [The Movement for Pedagogical Reform in the Czechoslovak Period and its Manifestations in Slovakia], Prešov, FF PU, 2002.

concepts for reforming society. Czech pedagogical thought could therefore be transferred to Slovakia in just a limited way.

It is the role of further research to analyze Czech-Slovak relations more in depth – the Czech-Slovak collaboration and dialogue and the figures supporting it – in order to be able to say more about the coexistence of ethnic Czechs and Slovaks during the interwar period. It is impossible to do this if ethnic Czech and Slovak pedagogues will be writing their “own” Czech or Slovak histories of pedagogical thought which will then be “expanded” to include the perspective of what happened on either the Czech or Slovak side. It is necessary to center, to a much greater degree, the issue of clashes, of transfer, and of transnational comparisons in order to comprehend the dynamics of Czech-Slovak interwar life. Such an approach requires a much more consistent, sensitive regard and respect for the specifics of the “other”, “cleansing” the main problems and questions raised in the discussions within each nation and reflecting on the experience of this past pedagogical principle “transfer”. Objective results can only be contributed by approaches and stakeholders who go beyond the Czech or Slovak frames and perform an analysis from the level of the transnational transfer of examples of the closedness or the openness of ethnic Czech and Slovak teachers as stakeholders who were “condemned, voluntarily” to building and rebuilding their own educational lives and thinking.

Creating the new (Slavic) world through education. A comparison of the educational discussions between the Slovenes and the Czechs*

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ABSTRACT: When the Austro-Hungarian Monarchy collapsed at the end of the First World War, there were 12 nations living there, including Slovenes and Czechs. The Slovenes joined the South Slavic nations in the Kingdom of Serbs, Croats and Slovenes, and the Czechs, together with the Slovaks, established the multinational Czechoslovak Republic. In the new Europe, new coalitions – political, cultural and also educational – were also sought and supported. Czech and Yugoslav collaboration was also an important issue. This was based on the rich collaboration in the 19th century in the so-called Slavic (sometimes Pan-Slavic) discussion. The following article reconstructs the Czech and Slovenian collaboration and transfer of pedagogical ideas and experiences in the interwar period (especially in the field of school reform), framed by the collaboration of both nations in the 19th century. The school reform in Czechoslovakia and Slovenia is reconstructed against the background of the academic discussion at that time (the dispute over empirical and philosophical educational sciences). The next goal is to compare the “architecture” of the school reform plans in both countries in the context of the academic pedagogical discussion. The professional contacts between Czech and Slovenian teachers in the interwar period are analyzed. The networking between the Czechoslovak and Slovenian teachers was quite intensive at that

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time, also thanks to the intensive collaboration of between school reform leaders – the Czech pedagogue Václav Příhoda and the Slovenian pedagogue Gustav Šilih. The visits of Slovenian teachers to the Czech reform schools and the lectures of the Czech school reform architects in Slovenia show that the reform pedagogical transfer between Czechoslovakia and Slovenia was intense.

EET/TEE KEYWORDS: Educational transfer; School reform; Progressive education; Life reform; Czechoslovakia; Yugoslavia; Slovenia; XIXth Century.

Introduction

The problem of cultural relations between Czechs and Slovenes in the second half of the 19th century and in the interwar period has in the past attracted the attention of historians of both nations¹. However, the question of contacts and cooperation between Czech and Slovenian pedagogues and teachers always remains a desideratum of the historical-pedagogical discussion. The following article tries to fill this gap in a systematic way. We analyse the cooperation between pedagogues and teachers in both “national camps” in the last third of the 19th century and especially in the interwar period. The question of school reform and the theoretical discussion about it in the interwar period is therefore the focus of our attention in the second part of the text. The reform of education and school (new education movement) was an integral part of the efforts for social reform (*Lebensreform*)², a life reform movement at the turn of the 19th and 20th centuries in Europe. As pointed out by Skiera, the reform of education and school was often expected to bring “salvation”³. The concepts of the “new man” and the “new education” encompassed very diverse, often undemocratic models of education based on the form of a «new society built by a new leader»⁴.

¹ L. Hladký, *Vztahy Čechů s národy a zeměmi jihovýchodní Evropy* [Relations between Czechs and the nations and countries of Southeastern Europe], Praha, Historický ústav, 2010; J. Rychlík, *Dějiny Slovinska* [History of Slovenia], Praha, LN, 2011; B. Urbančič, *Slovensko-čeští kulturní stiki* [Czech-Slovenian cultural contacts], Ljubljana, Mladika, 1993; M. Keršič-Svetel, *Česko-slovenski stiki med svetovnima vojnama* [Czech-Slovenian contacts between the two world wars], Ljubljana, Zveza zgodovinskih društev Slovenije, 1996.

² K. Buchholz, *Die Lebensreform: Entwürfe zur Neugestaltung von Leben und Kunst um 1900*, Darmstadt, Häusser, 2001; D. Kerbs, J. Reulecke (edd.), *Handbuch der deutschen Reformbewegungen 1880.1933*, Wuppertal, Peter Hammer, 1998.

³ E. Skiera, *Erziehung und Kontrolle*, Bad Heilbrunn, Klinkhardt, 2018; E. Skiera, *Reformpädagogik in Geschichte und Gegenwart*, München, Oldenbourg Verlag, 2010.

⁴ J. Oelkers, *Die Reformpädagogik. Eine Dogmengeschichte*, Weinheim, Juventa Verlag, 2005; H.-E. Tenorth, *Geschichte der Erziehung: Einführung in die Grundzüge ihrer neuzeitlichen Entwicklung*, Weinheim, Juventa Verlag, 2008, pp. 180.268; W. Scheibe, H.-E. Tenorth, *Die reformpädagogische Bewegung 1900.1932: Eine einführende Darstellung*, Weinheim, Juventa Verlag, 1994.

Also for Czech and Slovenian teachers and representatives of educational sciences, the topic of school reform and social reform at the turn of the 19th and 20th centuries and in the interwar period was a crucial point of discussion. At the end of the 19th century the topic of school reform and so-called life reform was connected with the national political emancipatory efforts of both nations in the Habsburg Monarchy (Czechs and Slovenes). In the interwar period, school reform became a means of forming a liberal democratic society (Czechoslovakia) and a conservative national Yugoslav society (Kingdom of Yugoslavia).

The following study deals with the question of school reform and life reform among Slovene and Czech teachers in the interwar period. The study analyzes the cooperation and professional contacts between Czech and Slovenian representatives of educational sciences and teachers on issues of school and life reform. We reconstruct the main issues of the interwar scientific educational discussion by Czech and Slovenian authors, proposals for school reform and the networking between the Czech and Slovenian teachers' community.

This analysis stands in the broader context and context of Czech-Slavic cooperation in the last third of the 19th century (first part of the article).

1. Slavic collaboration and Czech-Slovenian relations

Throughout the 19th century, the idea of Slavic collaboration, i.e., the collaboration of Slavic nations in the multinational Habsburg Monarchy, accompanied the discussion about their political organization and the position and role of Slavic nations in the cultural and economic life of the monarchy. National collaboration between Czechs and Slovenes was developed especially in the second half of the 19th century in close connection with the national emancipation movement of Czechs and Slovenes and the processes of formation of a modern nation and civil society during the 19th century. Especially after the transformation of the Austrian Empire into the Dual Monarchy of Austria-Hungary in 1867, contacts between Czechs and Slovenes intensified, because most Slavic nations found themselves in the Hungarian part of the monarchy. Czechs and Slovenes were two small Slavic nations with a similar position within the Austrian part of the monarchy, and both pursued similar political and cultural emancipation goals. On top of that, they could develop their contacts from the end of the 18th century and the first third of the 19th century, when the national revival movement of Slovenes, defined mainly by their national language, followed the example of Czech linguistic revival efforts⁵.

⁵ The contacts of Slovene intellectuals with Josef Dobrovský, the founder of Slavic studies and at that time the central figure of the Czech revival national movement, were significant. P.J.

Special mention should be made of G.A. Lindner (1828-1887), the leading representative of Herbartianist pedagogy in Central Europe (who later also represented positivist pedagogy)⁶, a professor at the grammar school in Celje (Cilli) between 1855 and 1871 (teacher of physics and the philosophical propaedeutic), and also a school inspector in the years 1869-1871⁷. He was transferred from the grammar school in Jičín (East Bohemia) to Celje because of his liberal views⁸. This was a significant acquisition for the Slovenes, but Lindner felt good among the Slovenes as well. Lindner taught mathematics in the grammar school⁹. He often taught German, and it is especially surprising that he also taught gymnastics on his own initiative and was very successful¹⁰. National contradictions in this environment placed a heavy burden on Lindner, and he did his best to overcome them. When the October Diploma (a constitution of the Austrian Empire) in 1860 allowed social and political life again, it was an opportunity to establish Slovene reading rooms, places that had a cultural and entertainment purpose, but also enabled political unification and especially the defense and building of Slovene national identity. From the very beginning, Lindner was intensely involved in the operation of the Celje reading room¹¹.

Šafařík, the leading representative of Czech revival Slavic Studies, and F.L. Čelakovský, one of the most prominent poets of the Czech National Revival, were also very important for Slovenes in this field. See Urbančič, *Slovensko-češki kulturni stiki* [Czech-Slovenian cultural contacts], cit., p. 10. The situation after 1848 brought new forms of cultural contacts between the two nations. The first works by Czech authors were staged in Slovene theaters and the first translations of Czech writings into Slovene were published. The Czech J.V. Lego, who served in several Slovenian towns in 1857-1862, was very active in encouraging mutual cultural contacts. He was one of the founders of the first Slovene reading room. After returning home, he founded the Czech-Slovene Society in Prague in 1888, which supported the publishing of Slovene books in the Czech lands, language education, and Slovene students in Prague. See *ibid.*, p. 24. In general, from the second half of the 19th century onwards, Czechs came to serve among the Slovenes more often (throughout the monarchy, the language of communication was of course German). An important role was played by J.N. Nečásek at the grammar school in Ljubljana, who as its principal in the years 1852-1862 achieved that the Slovene language began to be taken into account much more, and J. Vavrů, who served there in 1859-1887 and who, together with a Slovene author, coined Slovenian gymnastics terminology. See *ibid.*, p. 22.

⁶ T. Kasper, D. Kasperová, *Exactness and Czech pedagogy at the break of the 19th and 20th Century*, «History of Education & Children's Literature», vol. 12, n. 2, 2017, pp. 343-358.

⁷ See E. Protner, *Gustav Adolf Lindner und der pädagogische Herbartianismus in Slowenien*, in K. Grundig De Vazquez, A. Schotte (edd.), *Erziehung und Unterricht: neue Perspektiven auf Johann Friedrich Herbart's Allgemeine Pädagogik*, Paderborn, Ferdinand Schöningh, 2018, pp. 219-232; E. Protner, *Herbartianism and its educational consequences in the period of the Austro-Hungarian Monarchy: the case of Slovenia*, Frankfurt am Main, P. Lang, 2014.

⁸ See F. Kaiser, *Gustav Adolf Lindner als Pädagoge. Ein Beitrag zur Bildungsgeschichte des böhmisch-österreichischen Raumes*, Philosophische Dissertation, Salzburg, 1972, p. 18.

⁹ J. Orožen, *Zgodovina Celja in okolice* [Zgodovina Celja and surroundings], Celje, Kulturna skupnost, 1974, p. 201; J. Orožen, *G. A. Lindner v Celji* [G. A. Lindner in Celje], «Pedagogické rozhledy», vol. 39, 1929, p. 3.

¹⁰ See J. Mlinar, *150 let celjske gimnazije* [150 years of Celje grammar school], in *Celjski zbornik 1958* [Celje Proceedings 1958], Celje, Kulturna skupnost občine, 1958, p. 23.

¹¹ He was also present at the inaugural opening and, together with the high grammar

The years in Celje were of central importance for G. A. Lindner both in terms of science and his private life¹².

Although Lindner felt good in Celje, he could not realize his personal and professional ambitions here. He applied for various director positions in grammar schools (he wanted to move to Graz or Prague), but he was repeatedly rejected because of his Slavic origin¹³. His wish to relocate came true in September 1871 when he was appointed director of the lower real grammar school in Prachatitz (Prachaticze). In 1872 became a director of the Czech Teachers' College in Kuttenberg (Kutná Hora) that marked his final reorientation to pedagogy. He was employed at this teacher training college until 1882. He unsuccessfully competed for the chair of philosophy at Charles-Ferdinand University in Prague from 1872. His wish was not granted until a decade later when the university in Prague was divided into Czech and German parts. On 17 August 1882, he was appointed a full professor of philosophy and pedagogy there, but this lasted only five years until his death in 1887¹⁴. G. A. Lindner was an outstanding representative of pedagogical

schoolteacher Anton Hluščik, conducted the ceremony in Czech on behalf of Czechs. See B. Hartman, *Prvo leto celjske čitalnice* [The first year of the Celje reading room], in *Celjski zbornik* 1958 [Celje Proceedings 1958], Celje, Kulturna skupnost občine, 1958, p. 69.

¹² During his stay in Celje, Lindner started a family, as he got married here and had five daughters and a son. At the same time, it was a time of his intensive study and first publications in philosophy, psychology, sociology, history, and national economics. Pedagogy was not yet at the forefront of his interest at the time. Still, the first publications show that he thought about it with the desire to give meaning to his work as a university professor and provide it with an educational dimension. Already with the first articles which he wrote during his stay in Celje, Lindner established himself in the circle of leading intellectuals of Austria-Hungary. In particular, he found himself with a textbook for the grammar school subject *Philosophische Propädeutik*. The book was entitled *Lehrbuch der empirischen Psychologie nach genetischer Methode*, Cilli 1858. It was a standard grammar school textbook, published in 12 reprints by 1922, beginning with the second edition (Wien 1868) under the title *Lehrbuch der empirischen Psychologie als induktiver Wissenschaft*. During his stay in Celje, Lindner also wrote *Lehrbuch der formalen Logik* (1861) and a textbook entitled *Einleitung in das Studium der Philosophie* (1866). During this period, he also published two resounding philosophical monographs, and in smaller didactic discussions he already indicated his interest in pedagogy, which soon led him to the Herbartianists. See W. Brezinka, *Pädagogik in Österreich: Die Geschichte des Faches an den Universitäten vom 18. bis zum Ende des 20. Jahrhunderts*, Band 2, *Pädagogik an den Universitäten Prag, Graz und Innsbruck*, Wien, Verlag der österreichischen Akademie der Wissenschaften, 2003, p. 53 ff. Given the provinciality of the place where he lived and the level of pedagogical knowledge in that environment, it is inconceivable that in 1870, while still living in Celje, Lindner became a member of the *Verein für wissenschaftliche Pädagogik* (Society for Scientific Pedagogy), the central «core of Herbart's school», which, since 1868, when the Society was founded under the leadership of T. Ziller, has set the tone for Herbartianist pedagogy. See J. Oelkers, *Das Ende des Herbartianismus. Überlegungen zu einem Fallbeispiel der pädagogischen Wissenschaftsgeschichte*, in P. Zedler, E. König (edd.), *Rekonstruktionen pädagogischer Wissenschaftsgeschichte*, Weinheim, Deutscher Studien Verlag, 1989, p. 79.

¹³ Brezinka, *Pädagogik in Österreich: Die Geschichte des Faches an den Universitäten vom 18. bis zum Ende des 20. Jahrhunderts*, cit., p. 57.

¹⁴ *Ibid.*, p. 64.

life in Austria-Hungary, where political conditions were not favorable for the career of a free spirit and a liberal-minded intellectual. His example also shows how the cultural and educational discussions in Austria-Hungary were interconnected, and that not only between Slavic nations. Lindner succeeded in directing pedagogical thought towards evolutionism and positivism, “presetting” a common “pedagogical mindset” among representatives of the developing educational sciences as well as among teachers (his textbooks in the Austrian part of the monarchy played a role). However, analyzing and appreciating the role of G. A. Lindner in the pedagogical transfer of the second half of the 19th century would require much more space and independent study.

The Czech-Slovenian collaboration was also actively promoted by teachers. Jan Ladislav Mašek (1828-1886), a teacher and active chairman of Czech teachers' associations, deserves the most credit for spreading the idea of bringing Slavic teachers closer together from the early 1870s. In 1870 he was one of the main organizers of the First General Conference of Czech and Slavic Teachers in Prague. He had contacts with many patriotic teachers from the Yugoslav lands, especially Croats. He collaborated with the Slovene Andrej Praprotnik, the editor of the newspaper *Učiteljski tovariš* [Teacher Comrade] in Ljubljana. He was one of the initiators of the founding of the newspaper *Slovanski pedagog* [Slavic Pedagogue] (published in the years 1872-1873). There were also three Slovenes on the editorial board of this newspaper. Mašek's idea of bringing Slavic teachers closer together was partly carried out (the Teachers' Congress in 1870 in Bohemia was attended by Croatian teachers, while Czech teachers were guests at the Teachers' Congress in Zagreb), but got systematic only in 1908 when a congress of Slavic teachers and friends of education was organized in Prague¹⁵.

At the end of the 19th century, however, Slovenes were inspired by other forms of “national work” in the Czech national movement. In 1863, following the example of the Czech gymnastics organization Sokol, a Slovenian national

¹⁵ K. Rýdl, *O začatkih stikov med slovenskimi in češkimi učitelji* [The beginnings of contacts between Czech and Slovenian teachers], «Šolska kronika – Zbornik za zgodovino šolstva», vol. 26, 1993, pp. 51-60. See also B. Pleše, *Kongres slavenskog učiteljstva i prijatelja školstva u Pragu god. 1908* [Congress of Slavic Teachers and Friends of Education in Prague 1908], «Zbornik za povijest školstva i prosvjete», vol. 23, 1990, pp. 105-109. As early as 1902 and then again in 1906, the Slovene Teachers' Association adopted a proposal of the Alliance of Austrian Yugoslav Teachers' Associations to establish a department whose task would be to establish the Association of Slavic Teachers in Austria. The department persuaded other Slavic teachers' organizations in the country to participate, and on 20 August 1907, a meeting of the founding committee was held in Vienna. The inaugural General Assembly took place during the said Congress in Prague. The congress was attended by 325 delegates from the Yugoslav provinces, including 72 Slovenes. The Association of Slavic Teachers in Austria, founded at the time, consisted of 20,000 Slavic teachers. I. Dimnik, *Stiki JUU z inozemskim učiteljstvom* [The contacts between JUU and foreign teachers], «Učiteljski tovariš», vol. 73, n. 4, 1933, pp. 2-3.

gymnastics organization was founded (Južni Sokol [South Sokol])¹⁶. Also, *Slovenska šolska matica* [Slovenian School Publishing House] publishing Slovenian literature was created according to the Czech model. Like in the Czech lands, national pilgrimages were organized in Slovenia, and calendars and literature supporting Slovenian minority education were published. The so-called national conservation associations were an important part of the «national struggle» both in the Czech lands and Slovenia. This brought a large number of Czechs from the sphere of culture and science to Slovenia, as well as many Slovenes to the Czech lands. In 1888, a Czech-Slovenian Association was founded in Prague, supporting mainly cultural and scientific contacts between the two countries and nations¹⁷. Many articles in magazines of «Slavic reciprocity» published in Prague (such as *Slovan* magazine) also testify about cultural relations. Mutual relations were also cultivated in sports (mountaineering) and tourism, which at that time not only fulfilled the role of human physical development, but also getting to know the «national landscape and national culture». Equally important was the economic area. Collaboration was also developed in the political field – especially between Czech and Slovenian agrarians and social democrats. The Slovenian political debate was more conservative, and the younger Slovenian generation was getting liberal impulses from the Czech lands¹⁸. An important inspiration for Slovenes was also the politics of T. G. Masaryk and his «everyday political work», gradually changing the position and life of the Czechs in the monarchy. Young Slovenians were also impressed by Masaryk's emphasis on enlightenment and education and his liberal thinking. The city of Prague and the Czech part of Charles-Ferdinand University in Prague attracted a large number of Slovenian students. Especially after 1897, after disputes with German students at Austrian universities, the slogan *Away with Vienna and Graz – study in Prague!* spread among Slovenes¹⁹. In 1898, *Československý podpůrný spolek* [Czech-Slovenian Support Society] was founded in Prague, which financially supported less wealthy Slovene students²⁰. In 1907, there were 70 students studying in Prague at Charles-Ferdinand University; in 1910, 220 students²¹. In the 1910s, the activities of Slovenes leading to the establishment of the University of Ljubljana intensified. At the same time, Czechs demanded the establishment of a Czech

¹⁶ Keršič-Svetel, *Česko-slovenski stiki med svetovnima vojnama* [Czech-Slovenian contacts between the two world wars], cit., p. 6.

¹⁷ Hladký, *Vztahy Čechů s národy a zeměmi jihovýchodní Evropy* [Relations between Czechs and the nations and countries of Southeastern Europe], cit., p. 30.

¹⁸ *Ibid.*, p. 32.

¹⁹ Keršič-Svetel, *Česko-slovenski stiki med svetovnima vojnama* [Czech-Slovenian contacts between the two world wars], cit., p. 48. Many Yugoslavs and Slovenes also studied in Brno. *Ibid.*, p. 56.

²⁰ *Ibid.*, p. 49.

²¹ L. Hladký, *Historie česko-slovenských vztahů* [History of Czech-Slovenian Relations], in Rychlík, *Dějiny Slovinska* [History of Slovenia], cit., pp. 333-356, here p. 343.

university in Brno (founded in 1919 as Masaryk University). There was even a discussion about the idea of establishing a Slovenian university with the support of Charles-Ferdinand University in Prague, but the Slovenian clerical deputies, for whom Charles-Ferdinand University was too progressive, stopped the campaign²². However, the effort was made to form future Slovenian university professors academically at Charles-Ferdinand University in Prague. This was the case of Mihajlo Rostohar (1878-1966), who, after studying in Vienna and Graz and under Wilhelm Wundt in Leipzig, came to T. G. Masaryk to Prague, where he received his habilitation in 1911. Rostohar embodies a successful example of scientific collaboration between Czechs and Slovenes. At the end of the First World War, he helped to push through the establishment of the independent Yugoslavia and the University of Ljubljana²³. During the First World War, the political contacts of the Czechs and Slovenes were maintained, and both nations strived for international support for the recognition of their political independence – within Czechoslovak and Yugoslavian states.

After the establishment of Czechoslovakia and the Kingdom of Serbs, Croats and Slovenes (since 1929, the Kingdom of Yugoslavia), the relationship between Czechs and Slovenes changed in many ways. Both nations achieved state independence and autonomy, but their common goals and policy coordination were inevitably weakened. Although Czechoslovakia cooperated with Yugoslavia within the Little Entente, the interwar political orientation of the Czechs and Slovenes went in different directions (the Prague-Belgrade axis became more important than the Prague-Ljubljana axis). Within what was then Yugoslavia, Slovenia felt the effects of political crises in many areas of political, cultural and economic life, and in 1929 the strong hands of King Alexander and, after his assassination, of Prince Paul²⁴. The political scene in Slovenia was in many respects more conservative than the Czech lands of Czechoslovakia at the time. The liberal and democratic trends which developed in interwar Czechoslovakia were weak in interwar Yugoslavia²⁵. Social democrats, socialist-oriented parties and liberals, who were an important part of political life in the Czech lands, were politically weak in Yugoslavia and its Slovenian part, where

²² Keršič-Svetel, *Češko-slovenski stiki med svetovnim vojnama* [Czech-Slovenian contacts between the two world wars], cit., p. 49.

²³ M. Rostohar is given attention in the following subchapter.

²⁴ Rychlík, *Dějiny Slovinska* [History of Slovenia], cit., pp. 170-174.

²⁵ Liberally oriented teachers in Slovenia and the wider Yugoslavia adored the Czech President Masaryk. On his death in 1937, the leading Slovene pedagogical newspaper wrote on the cover under the picture of the deceased, among other things: «Fearless hammerer of the future, unparalleled statesman, Great Teacher, a wise educator of humanity, an ardent multiplier of culture and a passionate defender of humanity, truth, and justice: This was the work of Your life! Your hard struggle, leading your people from darkness to light and a sunny day, was not in vain. That is why the crown of immortality is bestowed upon Your head». *President Tomáš G. Masaryk, born 7 March 1850 – died 14 September 1937*, «Popotnik», vol. LIX, nn. 1-2, p. 1.

there was a prevalence of agrarians, Catholic-oriented and nationalist political trends²⁶.

The political integration and alliance of the two new states, based on Slavic reciprocity, began to crumble after 1935 when Yugoslavia began to move further and further away from the Little Entente and closer to Germany and Italy. However, contacts in the cultural and economic fields remained intense at all times, to which the Czechoslovak-Yugoslav and Yugoslav-Czechoslovak Leagues (which were initially closely linked to the work of both governments) contributed significantly. The Czechoslovak-Yugoslav League was first established in Prague, followed by branches throughout the country. The Yugoslav-Czechoslovak leagues in Yugoslavia were organized after the same model, except that the first league was established in Slovenia, followed by the League Association in Belgrade. It is no coincidence that the first Yugoslav-Czechoslovak League was founded in Ljubljana (October 1921). The initiator was Ivan Hribar, who was an envoy in Prague at the time. From the time of the Sokol Festival in 1907, many Czechs living in Ljubljana were associated in the *Československá obec* [Czechoslovak Community], and there were intensive contacts between the two Sokol organizations. Many entrepreneurs, cultural figures and politicians were in favor of contacts with what later became Czechoslovakia. The league was particularly active in the cultural field, and Czech language courses were also organized. The league had branches in major Slovenian cities – the one in Maribor was especially active²⁷.

However, the political and social development in Czechoslovakia and Yugoslavia, i.e., in Slovenia, was different, just as the development of pedagogical thought in the Czech and Slovenian educational discussions was different. While Czech educational sciences at the universities in Prague and Brno mostly developed experimentally and quantitatively focused research that could build on the scientific tradition of the turn of the 19th and 20th centuries influenced by pedagogical positivism and the pursuit of exactness in examining

²⁶ In this respect, it is important to mention Ivan Hribar (1851-1941), who worked in Prague at the Slavia Bank and founded its branches in Slovenia, where he supported the financial cooperation of Czechs and Slovenes. He later became the mayor of Ljubljana, a member of the Imperial Council, and contributed to the founding of the independent Yugoslav state as well as the University of Ljubljana. Hribar was a representative of national liberal and progressive politics in Slovenia with Ljubljana as one of its few centers. Hribar applied his experience of the liberal Czech environment in Slovenian political life and found it difficult to support the political development of interwar Yugoslavia. See Hladký, *Historie česko-slovenských vztahů* [History of Czech-Slovenian Relations], in Rychlík, *Dějiny Slovinska* [History of Slovenia], cit., pp. 333-356, here p. 341. Also T. Kregar, *Česko-slovaški vpliv na slovensko politiko in njen odnos do narodnega vprašanja po letu 1918* [Czech-Slovak influence on Slovene politics and its attitude to the national question after 1918], in N. Troha, M. Šorn, B. Balkovec (edd.), *Evropski vplivi na slovensko družbo* [European influences on Slovenian society], Ljubljana, Zveza zgodovinskih društev Slovenije, 2008, pp. 195-210.

²⁷ Keršič-Svetel, *Česko-slovenski stiki med svetovnima vojnoma* [Czech-Slovenian contacts between the two world wars], cit., p. 60 ff.

the nature of education and learning, the University of Ljubljana focused on spiritual and philosophical aspects of educational sciences.

2. Development of Scientific Educational Discussions of Czech and Slovenian Educators

The educational discussion of the Czech authors was an important part of efforts to reform society both at the turn of the 19th and 20th centuries and after the establishment of Czechoslovakia, and it was to address the fundamental negative impacts of industrialization, urbanization and modernization of life and also facilitate the formation of modern civil society – whether within the monarchy of Austria-Hungary or later within the newly established republic. In the Czech scientific discussion of the last third of the 19th century, as developed at the Czech part of Charles-Ferdinand University in Prague, the central concepts of Czech pedagogy as a science were progress and development. (Slovenian students who came to study in Prague before the First World War were also educated in this direction of scientific discussion)²⁸. On the one hand, the discussion was based on Spencer's positivist conception of education and the concept of development as a process based on laws and leading to higher forms of development of the organism's life (in the spirit of Darwin). On the other hand, there was an emphasis on the Enlightenment and cosmopolitan ideals of freedom and dignity of each person, which should not be trampled by the negative effects of modernization and the capitalist way of life in society. Therefore, the Czech educational discussion was about development, progress as well as humanitarian ideals²⁹. This enabled Czech educational sciences to reject education based on various metaphysical systems. Czech educational sciences were driven by the effort to provide an insight into the processes of “ingrowing” of an individual into a democratically formed society of politically equal citizens using “scientific methods”.

As the education journals show, tried the Czech teachers, when dealing with social and national issues, women's issues and the issue of modern man's relationship to faith and church institutions, not to undermine the power of reason³⁰. They cast off the trends of cultural pessimism and radicalism of the

²⁸ Unfortunately, after graduation these students did not have a more visible influence on the development of pedagogical thought in the homeland.

²⁹ T. Kasper, D. Kasperová, *Development and Focus of Czech Pädagogik in the Late 19th and Early 20th Centuries*, in B. Kudláčová, A. Rajskey (edd.), *Education and “Pädagogik” – Philosophical and Historical Reflections (Central, Southern and South-Eastern Europe)*, Berlin, Peter Lang, 2019, pp. 194-209.

³⁰ T. Kasper, D. Kasperová, *Nová škola v meziválečném Zlíně* [New School in interwar Czechoslovakia in Zlín], Praha, Academia, 2020, pp. 23-38.

“new time”. What was it based on? The Czech educational discussion was based on the strong and successful legacy of Czech pedagogical positivism developed by G. A. Lindner. In particular, the psychological and sociological stream in the educational discussion – represented by František Krejčí, T. G. Masaryk, Břetislav Foustka, Otakar Kádner and František Čáda – promoted positivism in educational sciences. The confidence that it was possible to understand a child’s development led to a shift towards experimental psychology and experimental pedagogy within pedopsychology (modeled on the study of children in the USA and Wundt’s laboratory at Leipzig). In particular, František Čáda (1865-1918) became the father of Czech experimentally oriented educational sciences, the results of which were, in his opinion, the basis for the reform of education, the reform of the school and of the «revitalization of society». Čáda was an important member of the Czech eugenic movement, within the framework of which he and Břetislav Foustka appealed for the pursuit of «a healthy individual and a healthy nation» which was not to trample on the ideals of a democratic society of free citizens striving for political and social equality (also with regard to political and social equality of modern woman!). Čáda was able to gain the trust of teachers in teachers’ associations and the educational press for pedagogical research on an experimental and quantitative basis. This became apparent after 1921, when the strongest teachers’ organization, the Czechoslovak Teachers’ Community, was founded, which soon after its establishment began to establish and financially support its own Institute for Experimental Pedagogy. The results of the research of this institute were thus disseminated among teachers in many courses and systematic studies comprising up to four semesters within the framework of further education of teachers, which this teachers’ association successfully organized throughout the interwar period³¹. Čáda managed to successfully promote the results of experimental pedagogical and psychological research within the framework of teacher training conventions. This led to the unprecedented development of Czech pedopsychology both in the university environment and in many institutes and institutions of a non-university nature. After the establishment of Czechoslovakia, a strong generation of Czech associate professors and professors of pedagogy studied actively and for a long time especially at the Teachers College in New York³², while many others completed a semester or short-term stays with Wilhelm Wundt, William Stern, Alfred Binet or representatives of the Geneva School of Psychology. Foreign experience and domestic experimental traditions then led Václav Příhoda, Cyril Stejskal, Stanislav Velinský and Mihajlo Rostohar to the development of exact

³¹ D. Kasperová, *Československá obec učitelská* [Czechoslovak Teacher Association], Praha, Academia, 2018.

³² T. Kasper, *Die wissenschaftliche Neuorientierung der tschechischen Pädagogik im Windschatten ihres amerikanischen Vorbildes – eine Zwischenkriegszeit Fallstudie*, in A. Hoffmann-Ocon, N. Grube, A. De Vincenti (edd.), *1918: Bildungshistorische Blicke auf Traditionen, Transitionen, Visionen*, Bad Heilbrunn, Klinkhardt, 2020, pp. 135-158.

and experimentally oriented pedagogy as a science. Although this wing was opposed by the representatives who emphasized the “deeper” philosophical foundations of the educational sciences (especially Otokar Chlup, Jan Uher, and in part Josef Hendrich), they did not succeed in weakening quantitative pedagogy.

The given focus of scientific pedagogical discussion was attractive not only for Czech pedagogues. Mihajlo Rostohar is an example of a Slovenian pedagogue and psychologist who also embarked on the path of experimentally focused educational sciences. After a successful habilitation in philosophy in 1911 in Prague (there were no habilitations in psychology at that time), Rostohar established his own psychological laboratory³³. However, the First World War took him to the front. After the war, Rostohar was one of the most engaged intellectuals in founding the Slovenian university. He wrote the first statutes of the new university, proposed the appointment of its first professors (many came from Prague) and made plans to establish an institute of psychology. Still, his political beliefs (he was a socialist) were the reason why he did not find himself on the list of new professors. Besides, because of a false accusation he had to seek justice in the courts. Rostohar won the dispute in the courts³⁴, but his resentment was so great that he returned to Bohemia where his habilitation was official and he was able to lecture and work as a *Privatdozent* [private docent, private associate professor] at Charles University in Prague. Undoubtedly, this was a great pity for the development of experimental psychology and pedagogy in Slovenia. Instead, spiritual pedagogy was established at the Faculty of Arts of the University of Ljubljana, personified by Karel Ozvald throughout the interwar period. At the same time, Rostohar's appointment as a full professor was complicated³⁵.

After the war, Rostohar sought to develop experimental psychology and pedagogy at the newly founded University of Ljubljana. However, he was accused of embezzlement and eventually returned to Bohemia, where his habilitation still applied and he was able to work as a private lecturer in Prague. However, his quest for becoming a full professor was not immediately

³³ J. Brožek, J. Hoskovec, *Mihajlo Rostohar v Praze* [Mihajlo Rostohar in Prague], in J. Švancara (ed.), *Mihajlo Rostohar (1878-1966) v tradici celostní a experimentální psychologie* [Mihajlo Rostohar (1878-1966) fruitful tradition of integrative and experimental psychology], Brno, Masarykova univerzita, 1999, pp. 17-24, here pp. 20-21.

³⁴ A. Benedetič, *Mihajlo Rostohar*, «Delo», vol. 31, n. 78, 1989, p. 6.

³⁵ M. Rostohar was regarded with disrespect by some Czech professors because his psychological orientation was not sufficiently positivistic. These professors used their influence in filling professorial positions at universities – also in the case of Rostohar. See J. Švancara, *Čtvrt století badatelské, pedagogické a organizační činnosti M. Rostohara v Brně v letech 1923-1949* [The quarter of a century of research, educational and organizational activities of M. Rostohar in Brno in the years 1923-1949], in J. Švancara (ed.), *Mihajlo Rostohar (1878-1966) v tradici celostní a experimentální psychologie* [Mihajlo Rostohar (1878-1966) fruitful tradition of integrative and experimental psychology], Brno, Masarykova univerzita, 1999, pp. 26-68, here pp. 26-34.

supported. Rostohar opposed the atomization of psychological life as presented by Czech positivists, thus earning their considerable criticism. Finally, in 1923 he managed to get an associate professorship at Masaryk University in Brno and subsequently a full professorship. In the interwar period, Rostohar managed to establish his own psychological school on an experimental basis, but which emphasized psychological structuralism in its integrative approach³⁶. Rostohar also succeeded in successfully developing the previously established Society for Child Study and Child Care. Its fifth congress in 1933, held in Brno, was conceived as an all-Slavic congress, and another congress in 1937 was held in Ljubljana. Rostohar's scientific work in Brno was interrupted by his departure to Slovenia during the Second World War. In the spring of 1945, however, he returned to Brno and continued his pedagogical and scientific activities. This was definitively interrupted by the communist coup in Czechoslovakia in 1948³⁷. In 1949 Rostohar returned to Slovenia and in the same year began teaching psychology at the Faculty of Arts (University of Ljubljana). In 1950, on his initiative, the Faculty established the Department of Psychology and the Institute of Psychology³⁸.

It seems that between the two world wars, Mihajlo Rostohar had a much more significant influence on scientific discourse in Czechoslovakia than in Slovenia. His empirical psychological approach became established in Slovenia as late as 1949 when he returned from Brno. Between the two world wars, the phenomenological approach and (as we have already mentioned) spiritual pedagogy prevailed at the Faculty of Arts in Ljubljana³⁹. In the absence of academic support, the experimental empirical approach to the research of pedagogical practice could not be established in the Slovenian university environment and among teachers. An empirical study of the child's social

³⁶ J. Heller, *Rostohariův strukturalismus* [Rostohars structuralism], in Švancara (ed.), *Mihajlo Rostohar (1878-1966) v tradici celostní a experimentální psychologie* [Mihajlo Rostohar (1878-1966) fruitful tradition of integrative and experimental psychology], cit., pp. 89-98.

³⁷ Švancara, *Čtvrt století badatelské, pedagogické a organizační činnosti M. Rostohara v Brně v letech 1923-1949* [The quarter of a century of research, educational and organizational activities of M. Rostohar in Brno in the years 1923-1949], cit., p. 50.

³⁸ *Kratka zgodovina Oddelka za psihologijo do leta 2000* [A brief history of the Department of Psychology up to 2000], <<https://psihologija.ff.uni-lj.si/o-oddelku/zgodovina-oddelka-za-psihologijo>> (last access: 07.12.2020).

³⁹ Although Ozvald, as a typical representative of spiritual pedagogy, was reticent about experimental psychology and pedagogy, he highly valued Rostohar's work, as can be seen from his assessment of Rostohar's book *Psychologické základy počátečního čtení* [Psychological Foundations of Initial Reading], which Rostohar self-published in 1934 in Brno. K. Ozvald, *Psiholog-znanstvenik o elementarnem branju* [Psychologist-scientist on elementary reading], «Popotnik», vol. LVI, n. 3, 1934/35, pp. 67-70.

Ozvald also reported on the proceedings from the developmental psychological congress in 1933 in Brno (880 participants), organized by Rostohar, especially praising Rostohar's contribution. K. Ozvald, *Pátý sjezd (první slovanský) pro výzkum dítěte v Brně 28 – 31. října 1933* [The fifth congress (the first Slavic one) for child study in Brno 28 – 31 October 1933], «Popotnik», vol. LVI, n. 5, 1934/35, p. 159.

environment was conducted by left-wing teachers, but this development took place entirely outside the academic community. In the period between the two world wars, four pedagogical orientations can be identified in Slovenia⁴⁰:

(1) Spiritual or cultural pedagogy⁴¹ has established itself in Slovenia (as elsewhere in Europe) due to the intrusion of positivism into the humanities and social sciences. Its representatives understood education as an individual's infiltration into the world of historically conditioned objective values, which they explored with the help of hermeneutics. Within this pedagogical direction, a requirement was formulated that education and pedagogy should be relatively autonomous and that children should be protected from various types of indoctrination. It was a requirement (characteristic of this direction) to establish a pedagogical responsibility and a pedagogical relationship between the educator and the pupil, and a specific understanding of the relationship between theory and practice was also assumed. As in German universities, this pedagogical direction became established in the academic environment. The most important representatives of this pedagogical direction in Slovenia were Karel Ozvald and Stanko Gogala.

(2) Reform pedagogy⁴² took shape as the most radical response to the critique of the old school. One of the central slogans of its representatives was that educational goals should be derived from the child's nature and that the entire education should be subordinated to the child's needs, desires, interests, and abilities. Education was conceived as a process of natural development or maturation; the educator should only monitor and support this process. The didactic image of the lesson in this pedagogical concept highlighted the child's activity, independence and creativity. This pedagogical direction in Slovenia was most comprehensively represented by Anton Osterc as well as by Franjo Žgeč. Žgeč strongly influenced the establishment of this pedagogical direction among Slovenian teachers with some formulations in the work program of the Maribor Teachers' Association called *Pedagoška centrala* [Pedagogical Center]. Reform-oriented teachers-practitioners gathered here and established contacts with Czech pedagogues in search of new pedagogical paths. The long-time president of this association, Gustav Šilih, deserved outstanding credit for this.

(3) Socio-critical pedagogy⁴³ has been closely linked in historical development with the development of the labor movement and Marxist critique of society. Its representatives understood education as a social process of an individual's

⁴⁰ For the logic of the classification of pedagogical directions in Slovenia, see Z. Medveš, *Spopadi paradigem v razvoju slovenske pedagogike* [Conflicting paradigms in the development of Slovene pedagogy], «Sodobna pedagogika – Journal of Contemporary Educational Studies», vol. 66 (132), n. 3, p. 10.

⁴¹ E. Protner, *Pedagogika in izobraževanje učiteljev* [Pedagogy and teacher education], Nova Gorica, Educa, 2000, pp. 33-49.

⁴² *Ibid.*, pp. 50-65.

⁴³ *Ibid.*, pp. 65-81.

integration into society. They derived educational goals from an analysis of the social conditions in which a child grows up, and from a Marxist vision of social development. In Slovenia, the most prominent representatives of this pedagogical direction were left-wing teachers and sympathizers of socialist ideas, organized in the *Učiteljski pokret* [Teachers' Movement]. They criticized the then existing social order and the injustice of access to education, based on their empirical pedagogical and sociological study and portrayal of the miserable social conditions of children of workers and peasants. They believed that effective school reform could not be carried out without first improving the poor social, economic, and cultural situation and the related political system⁴⁴.

(4) The development of Catholic pedagogy⁴⁵ between the two world wars was less pronounced than before the First World War. It included many ideas from other pedagogical fields. Its unique feature is the exposure of divine revelation as the fundamental source of pedagogy and the resulting notion of religious education. If the teachers who joined the liberal-oriented teachers' associations were in the majority, the Catholic-oriented teachers also represented a strong professional and ideological political group.

3. Czech and Slovenian interwar school reform

It was not only Czech educational sciences that inspired the Slovenian educational discussion and profiled the personalities of pedagogical life within the framework of Czech-Slovenian collaboration. The development of educational sciences in both countries was closely linked to the discussion on school reform and social reform⁴⁶. We can assume that just as the views on social reform differed in both national groups (of course, with all the simplification of an otherwise diverse and rich discussion), the basic approaches to school reform differed as well⁴⁷.

⁴⁴ E. Protner, *Konstituierung der sozialkritischen pädagogischen Richtung zwischen den beiden Weltkriegen in Slowenien*, «Historia Scholastica», vol. 6, n. 1, 2020, pp. 56-67.

⁴⁵ Protner, *Pedagogika in izobraževanje učiteljev* [Pedagogy and teacher education], cit., pp. 81-92.

⁴⁶ T. Kasper, D. Kasperová, *Reforma školy v ČSR jako úsilí učitelstva o reformu společnosti a národa* [School reform in Czechoslovakia as a part of life transfer and social reform], in T. Kasper, D. Kasperová, M. Pánková (edd.), *Národní školství za první československé republiky* [Elementary education in the First Republic of Czechoslovakia], Praha, Academia, 2018, pp. 161-166.

⁴⁷ T. Kasper, D. Kasperová, *Úsilí o reformu školy národní školy u českého učitelstva v prvním desetiletí trvání ČSR* [School reform efforts among Czech teachers in the first decade of the existence of Czechoslovakia], in Kasper, Kasperová, Pánková (edd.), *Národní školství za první československé republiky* [Elementary education in the First Republic of Czechoslovakia], cit., pp. 169-218, and T. Kasper, *Eduard Štorch's New School as an Example of a School Reform*.

Czech reform educators were thoroughly acquainted with the issues of quantitative and experimental pedagogy from the professional literature, from the rich pedagogical press and, last but not least, from active and intensive lectures by associate professors and professors studying in the USA and European countries⁴⁸. The principles of the so-called rationalization (scientific management) applied not only in production and in the economy, but also in many other branches of society, including education, were extended. The school system was to be rationalized just as the teaching process and the learning process itself. Rationalization, technization and technocratization of life to a large extent stimulated Czech pedagogical thought concerning the reform of society. It was widely believed that rationalized procedures could streamline society's operations and work performance in all sectors to such an extent that "lasting progress" would be ensured⁴⁹. Czech representatives of the social and educational reforms in the 1930s discussed a democratic and socially just education system, a system supporting the formation of democratic thinking and actions of the next generation. Last but not least, learning processes were to be based on the individual abilities of the child and learning. The so-called active learning should be based on problem solving situations which would have a natural motivational value for the pupil.

The school reform program was formulated especially during 1928 and 1929 in the close cooperation of reform commissions consisting of a representative part of teachers as well as associate professors and professors of pedagogy, psychology, sociology, hygiene, social anthropology, medical science and representatives of professional didactic discussion⁵⁰. An important reform commission grew within the above-mentioned teaching organization of the Czechoslovak Teachers' Community. The requirement was to unify various educational institutions at the lower secondary level (general school, *Bürgerschule* [burgher school], different levels of secondary education provided by *Gymnasium* [grammar school] and *Realschule* [real school]) into one educational institution. The so-called unified school was, of course, politically

Experiment in Interwar Czechoslovakia, in B. Vincze, K. Kempf, A. Németh (edd.), *Hidden Stories – the Life Reform Movements and Art*, Berlin, Peter Lang, 2020, pp. 159-175.

⁴⁸ T. Kasper, *Die wissenschaftliche Neuorientierung der tschechischen Pädagogik im Windschatten ihres amerikanischen Vorbildes – eine Zwischenkriegszeit Fallstudie*, in Hoffmann-Ocon, Grube, de Vincenti (edd.), 1918: *Bildungshistorische Blicke auf Traditionen, Transitionen, Visionen*, cit., pp. 135-158.

⁴⁹ T. Kasper, D. Kasperová, *The Baťa Company in Zlín – a Shoe Company or a School Company?*, «History of Education», n. 3, 2018, pp. 321-348.

⁵⁰ T. Kasper, D. Kasperová, *Úsilí o reformu školy národní školy u českého učitelstva v druhém desetiletí trvání ČSR* [School reform efforts among Czech teachers in the first decade of the existence of Czechoslovakia], in Kasper, Kasperová, Pánková (edd.), *Národní školství za první československé republiky* [Elementary education in the First Republic of Czechoslovakia], cit., pp. 221-234.

a very explosive issue and it was not easy to secure its legislation⁵¹. The other aspect of the school reform concerned the internal operation of the school – promoting active learning based on independent activity of the pupil (both individually and in groups), on problem solving situations. The pupil was to prepare for life in a democratic society not by learning about democracy, but the democratic principles of coexistence were to be developed specifically in the school environment (school democracy)⁵². This goal was to be achieved through school parliaments, student magazines, the close connection between the school and its social environment, collaboration with parents, support for the “right” choice of future employment, but also a rich offer of leisure activities and active support of scouting. In this respect, the discussion about the reform on a theoretical level was based on several streams and movements (behaviorism, pragmatism, integrative psychology), which were, surprisingly, in many respects contradictory on a theoretical level. However, in arguing about the goals and methods of the reform, the reform practice was able to connect and simplify the given streams to such an extent that they provided a broader framework for school reform efforts in the educational discussion.

However, the program of reform pedagogy formulated and published in 1929 was not to be just a program for a few “elite” reform schools. It was to be verified in a network of state-sponsored experimental schools and subsequently evaluated and finalized into a binding school reform program (supported by the adoption of the new Education Act, called for by teachers in Czechoslovakia from 1918 since the collapse of the monarchy) and supplemented by the adoption of new school curricula. In 1929, the Ministry of Education agreed to verify the school reform principles and established experimental schools at both primary and lower secondary school level. The number of such schools was increasing very rapidly. Later, in the spirit of an active school, called social school, one such secondary school was opened in Prague.

The school reform program was quite attractive also for Slovak teachers (and only in part for Sudeten German teachers living in the common Czechoslovak state) and for foreign teachers. Czech reform schools and leaders of Czech school reform discussed the starting points of the “new” Czech school intensively in international forums (especially within the NEF – New Education Fellowship, but also in other international meetings in Eastern and Southeastern Europe). The Slovenian pedagogical press followed the school reform developments in Czechoslovakia very closely and with interest and compared it with the situation at home. The collaboration between the leader of the Czech school reform, Václav Příhoda (1889-1979) and Gustav Šilih (1893-1961), the long-

⁵¹ T. Kasper, *Die Reform der Mittelschule in der Ersten Tschechoslowakei – soziale oder pädagogische Frage?*, «Bildung und Erziehung», vol. 70, n. 2, 2017, pp. 183-196.

⁵² T. Kasper, D. Kasperová, *National, state and civic education in the Czech Lands of Austro-Hungarian Empire in Czechoslovakia after 1918*, «History of Education & Children's Literature», vol. 10, n. 1, 2015, pp. 251-278.

time president of the Pedagogical Center in Maribor, provided this interest of Slovenes in the Czechoslovak school reform from 1926 onward with a whole new dimension. Although Příhoda was a university professor, there were never any close contacts with Ljubljana's academic pedagogy (which also represented an entirely different pedagogical paradigm and acted somewhat sublimely towards the reform efforts of teachers). Instead, the acquaintance between Příhoda and Šilih, who was initially a teacher at a secondary school and a trade school between the two world wars and a professor at a teacher's college in Maribor from 1928⁵³, grew into an intensive professional collaboration based on genuine friendship⁵⁴. Příhoda and Šilih concentrated on issues of teacher education, school reform and, of course, the theoretical focus of educational sciences. They first met in 1926 on a several-week holiday study stay in Geneva at the J. J. Rousseau Institute (among 65 participants from 23 countries), where they were the only representatives of Central and Southeastern Europe and Slavic teachers. This brought them closer together. In particular, Šilih stated in his later reports that Příhoda had captivated him with a deep insight into American pedagogy, the foundations of quantitative pedagogical research, but also into the possibilities of developing a democratic, active school.

Their close contacts in 1931 led Šilih to organize a long-term study stay of Příhoda in Maribor and Slovenia. Příhoda became the central figure and lecturer of a four-day course organized by the Maribor Pedagogical Center during the summer holidays, and his contribution was translated and published in *Popotnik* [Traveler] (central Slovene pedagogical scientific journal). Příhoda in his lecture presented the Review of World School Reforms and the Organization of Czechoslovak Education, paying particular attention to understanding and conceptualizing a unified school. His lecture resonated strongly among Slovenian progressive teachers and further strengthened their excellent collaboration. Šilih recognized in Příhoda the leading figure of the Czech school reform and kept the Slovenian pedagogical public informed about his efforts. In 1934, Šilih presented to the Slovenian public Příhoda's book *Racionalisace školství* [Rationalization of Education] in detail in an article entitled *The*

⁵³ At that time, Šilih was undoubtedly one of the most pedagogically well-informed teachers in Slovenia, although his formal professional education consisted of completing his studies at a teacher training college. However, he complemented his self-education by professional training abroad. In the academic year 1923/1924 he continued his studies with the couple Karl and Charlotte Bühler in Vienna (lectures on child and youth psychology), and in 1926 he took a one-month course in Geneva with the psychologist Edouard Claparède. In 1928 he graduated from the Higher Pedagogical School of Pedagogy, Psychology, and German in Zagreb (Croatia). (F. Dobrovoljc, *Šilih, Gustav (1893-1961)*, in A. Gspan *et alii* (edd.), *Slovenski biografski leksikon: 11. zv. Stelé – Švikaršič* [Slovenian biographical lexicon: 11th vol. Stelé – Švikaršič], Ljubljana, Slovenska akademija znanosti in umetnosti, 1971).

⁵⁴ This is evidenced by the rich correspondence between Příhoda and Šilih, kept by the J.A. Comenius Pedagogical Museum in Prague.

*Conceptual Bases of Czechoslovak School Reform*⁵⁵; he also drew attention to the German translation of this book⁵⁶. In the above-mentioned article, Šilih pointed out the “realistic” approach of the Czechoslovaks to school reform, which among all Slavs brought them closer to the American mentality. After the first decade of more or less unrelated reform attempts by individuals and professional associations, where the influence of American educators (Dewey, St. Hall) and those from Europe (Tolstoy, Montessori), German educators excepted, is noticeable, school reform flourished in 1928. President Masaryk’s initiative was decisive. According to Šilih, this reform phase is characterized by a systematic, scientific approach established by two commissions. Of particular importance is the commission for primary schools, which was headed from 1930 by «the pedagogue well-known to Slovenes, Dr. Václav Příhoda (lecturer at the pedagogical course of the Pedagogical Center in Maribor on 1 January 1931), who can be called the inspirer and organizer of Czechoslovak school reform»⁵⁷.

In a short biographical outline, Šilih described Příhoda as a supporter of *objective psychology*. «His views are in theory similar to Judd’s and Dewey’s functional psychology, and methodologically, to dynamic (Thorndike) and behavioral psychology. As an educator, in organizational terms he is a supporter of a differentiated unified school, and in the didactic view, of a working school»⁵⁸. In the text Šilih reported that at the time of publication of this article, it could already be argued that Příhoda’s reform attempt had undoubtedly succeeded. In 1932/1933, students from four-year primary and four-year experimental secondary schools had already completed their schooling. The results of the evaluation (according to Šilih) promised that such a model could soon be established throughout the country⁵⁹.

We have already mentioned that interest in school reform developments in Czechoslovakia and collaboration among teachers was very keen. This interest and mutual affection, based on Slavic reciprocity, was also manifested at the

⁵⁵ G. Šilih, *Idejne osnove češkoslovaške šolske reforme* [Goals of the Czechoslovak School Reform], «Popotnik», vol. LVI, n. 6, 1934/35, pp. 162-171. In the same issue of the journal, this article is followed by a translation of the concluding chapter from his book *Globální metoda*. (V. Příhoda, (transl. by L. Vedralova), *Kaj je torej globalna metoda?* [So what is the global method?], «Popotnik», vol. LVI, n. 6, 1934/35, pp. 172-173). With this translation, Šilih drew attention to the lack of understanding of this method in K. Ozvald, which he found in his article on Rostohar (see footnote 28), which further illustrates the cognitive-theoretical discrepancy between spiritual pedagogy and highly empirically based Czech pedagogical doctrine.

⁵⁶ G. Šilih, *Václav Příhoda, Rationalisierung des Schulwesens. – Funktionelle Organisation des Schulsystems. – Übersetzt von Rud. Fischer. – Verlag A. Haase, Prag 1935*, «Popotnik», vol. LVII, n. 5-6, 1935/36, p. 155. Šilih summarizes the emphasis of the translator, who believes that this book is a fundamental work of the entire school reform movement in Czechoslovakia.

⁵⁷ Šilih, *Idejne osnove češkoslovaške šolske reforme* [Conceptual bases of Czechoslovak school reform], cit., p. 162.

⁵⁸ *Ibid.*, p. 163.

⁵⁹ *Ibid.*, p. 164.

level of mutual visits of larger teacher groups. Organized by the leadership of the Association of Yugoslav Teachers, a group of almost 100 teachers from all parts of Yugoslavia traveled to Czechoslovakia in July 1926⁶⁰. The program was prepared by the *Československá obec učitelská* [Czechoslovak Community of Teachers] and was more of a tourist than a professional nature⁶¹. On behalf of the Slovenian part of the delegation, after arriving home to the hosts in Czechoslovakia, the rapporteur thanked, among other, with the words: «With tearful eyes, we said goodbye to you, dear brothers in the north, and when you come to us, we will offer you all that will be in our power. And your and our hearts cried out, 'Goodbye!'»⁶². The reunion took place two years later when teachers from institutions for children with special needs visited Yugoslavia (Belgrade, Zagreb and Ljubljana), led by the Czech teacher Josef Zeman⁶³. Czechoslovak teachers came to Yugoslavia again in May 1931 and stopped in Slovenia on the way. As with the previous excursion, they visited Bled, and in Ljubljana, they saw one of the schools. In July of the same year, a group of 54 Czechoslovak teachers arrived in Ljubljana, visited the teacher's printing house, and went home the next day – after visiting Bled. According to the rapporteur, they were delighted with the hospitality offered by Slovenian teachers⁶⁴. Yugoslav teachers traveled to Czechoslovakia again in May 1933. The professional excursion, organized by the Yugoslav-Czechoslovak League in Zagreb, included a tour of schools in several cities⁶⁵ and left a powerful impression on the participants⁶⁶. The most impactful and professionally relevant was the excursion organized in 1936 by the Pedagogical Center in Maribor led by Šilih. According to him, the purpose of the excursion was to acquaint the participants (all of them Slovenes) with Czechoslovak education, especially reform education, and with leading Czechoslovak pedagogues,

⁶⁰ *Načrt za potovanje članov UJU v Češkoslovaško republiko* [Plan for the travel of UJU members to the Czechoslovak Republic], «Učiteljski tovariš», vol. 66, n. 14, 1926, p. 2.

⁶¹ *Ekskurzija učiteljstva UJU po Češkoslovaški republici* [Excursion of UJU teachers in the Czechoslovak Republic], «Učiteljski tovariš», vol. 66, n. 13, 1926, p. 3.

⁶² S. Mrovlje, *Zahvala 'Ferijalega Udruženja Jugoslavskega Učiteljstva' ob priliki poučne ekskurzije po Češkoslovaški od 2. do 21. julija t. l.* [Thanks to the 'Holiday Association of Yugoslav Teachers' on the occasion of an educational excursion around Czechoslovakia from 2 to 21 July this year], «Učiteljski tovariš», vol. 66, n. 5, 1926, p. 4.

⁶³ *Češkoslovaški učitelji v Sloveniji*, [Czechoslovak teachers in Slovenia], «Učiteljski tovariš», vol. 69, n. 8, 1928, p. 2.

⁶⁴ *Češkoslovaški učitelji v naši državi* [Czechoslovak teachers in our country], «Učiteljski tovariš», vol. 72, n. 3, 1931, p. 4.

⁶⁵ *Ekskurzija jugoslovenskega učiteljstva na Čehoslovaškem* [Excursion of Yugoslav teachers in Czechoslovakia], «Učiteljski tovariš», vol. 73, n. 40, 1933, p. 1.

⁶⁶ A. Debenak, *Vtisi iz učiteljske študijske ekskurzije po Čehoslovaški* [Impressions from a teacher's study tour of Czechoslovakia], «Učiteljski tovariš», vol. 74, n. 10, 1933, pp. 2-3. These excursions are recorded in Gregurec, *Slovensko-Češko sodelovanje med prvo in drugo svetovno vojno na področju kulturnih stikov in šolstva* [Slovenian-Czech cooperation between the First and Second World Wars in the field of cultural contacts and education], cit.

pedagogical institutions and pedagogical literature. All this was supposed to enable «a new, Slavic-oriented pedagogical orientation of our teachers»⁶⁷. The 28 participants in the excursion (19-31 May 1936) included representatives of school authorities, university professors (among them Karel Ozvald), and burgher and folk schoolteachers. They went from Maribor via Vienna to Bratislava, Zlín, Brno, Hradec Králové, Poděbrady, Prague, Tábor, Budějovice, Linz and Klagenfurt back to Maribor. They visited many ordinary and experimental reform schools, hospitable classes, attended a congress of teachers of experimental schools in Brno, visited many social and cultural institutions including the Rostohar Psychological Institute in Brno. Šilih reported that they were received with «sincere sympathy, unforced hospitality and the greatest attention»⁶⁸ everywhere. Together with Czech teachers and their organizations, he attributed the most credit for the «wonderfully successful excursion»⁶⁹ to «the leader of the Czechoslovak reform movement, Dr. Příhoda»⁷⁰. The fact that the entire issue of *Popotnik*, published in September 1936, was devoted to articles dealing with Czechoslovak education and reports from the excursion, testifies how much this excursion resounded with the Slovene professional public. In the editorial, the editorial board pointed out that «this Czechoslovak issue of *Popotnik* should help to bring the rapprochement with the fraternal Czechoslovakia as close and firm as possible and to start analytical work in the spirit of our reciprocity thought in the pedagogical field as well»⁷¹. In the same year, an extensive article on the history of Czech education and the current situation was published in the annual proceedings of the Slovene School Publishing House⁷², and the following year saw the publication of an article on Slovak education⁷³.

Given Slovenian teachers' interest in the Czech school reform, the translation of Příhoda's book *Ideology of New Didactics*, which aroused great interest in the Slovene professional public, is not surprising. The book was presented in *Popotnik* by Ernest Vranc, a staunch supporter of reform pedagogy and Šilih's follower. Vranc was especially impressed that the author, in addition to pedagogical and developmental psychological starting points, also emphasized the importance of the social context. With Příhoda (and through him, Šilih), the line of reform pedagogy that rejected extremely pedocentric forms of school

⁶⁷ G. Šilih, *Pedagoška ekskurzija slovenskih učiteljev na Češkoslovaško* [Pedagogical excursion of Slovenian teachers to Czechoslovakia], «Popotnik», vol. LVIII, n. 1-2, 1936/37, p. 1.

⁶⁸ *Ibid.*

⁶⁹ *Ibid.*

⁷⁰ *Ibid.*

⁷¹ Uredništvo, *Pedagoška ekskurzija slovenskih učiteljev na Češkoslovaško* [Pedagogical excursion of Slovenian teachers to Czechoslovakia], «Popotnik», vol. LVIII, n. 1-2, 1936/37, p. 2.

⁷² J. Šedivý, *Češkoslovaško šolstvo* [Czechoslovak education], in K. Ozvald (ed.), *Pedagoški zbornik*, Ljubljana, Slovenska šolska matica, 1936, pp. 147-166.

⁷³ J. Šedivý, *Slovaško šolstvo* [Slovenian education], in K. Ozvald (ed.), *Pedagoški zbornik*, Ljubljana, Slovenska šolska matica, 1937, pp. 189-201.

work became established in Slovene pedagogy. In this spirit, the reviewer pointed out that Příhoda's slogans «Didactic order! The natural situation in class! Individualization of lessons, collectivization of education!» should become a guide to school work in the future⁷⁴. Otherwise, the pedagogical press regularly brought reviews of his books⁷⁵, which were published in Czechoslovakia and in translations, as well as reviews of other Czech authors⁷⁶.

Interest in Czechoslovak pedagogical thought remained intense among Slovene (and Yugoslav) teachers until the beginning of the Second World War, as evidenced by, i.e., the correspondence between Příhoda and Šilih and other representatives of Yugoslavian pedagogy, kept by the J. A. Comenius Pedagogical Museum in Prague.

Conclusion

Slovenes and Czechs' mutual affection stems from both nations' historical location in a common, first Habsburg, and later Austro-Hungarian monarchy. In an effort to preserve national identity and more independence within a multinational state, the two nations were united by Slavic reciprocity. In parallel with the political alliance, rich cultural and economic contacts developed – especially the Slovenes sought and found many examples among the Czechs. This was especially evident in the school pedagogical field between the two wars when both nations came to life in the new state frameworks, which also triggered an intensive school reform effort. The Czechs were inappropriately more successful than the Slovenes. The democratic standards of the political system of the new Czechoslovak state allowed a tolerant discussion about school reform, based on the professionally well-founded arguments of Czech educators who managed to gain independence from the once-dominant Germanic pedagogical thought. Slovenes were less fortunate within the new multinational state. Although they entered the new country with the best-developed school system (as a legacy of the Austro-Hungarian school system), the school reform effort was directed by Belgrade politics, which did not listen to the proposals of Slovenian educators.

⁷⁴ E. Vranc, *Vaclav Příhoda, "Ideologija nove didaktike" (prevedla L. Vedralova). Slov. šol. matica v Ljubljani 1937* [The ideology of the new didactics (transl. by L. Vedralova)]. *Slovenian School Publishing House in Ljubljana 1937*, «Popotnik», vol. LX, n. 1-2, 1938/39, pp. 79-80.

⁷⁵ F.T. Maslić, *Vaclav Příhoda s sodelovanjem J. Trajera, M. Dismana in M. Kiihnelove: Praxe školského měření* (Praksa šolskega merjenja. Testovanje v narodni šoli), Praha, Dědictví Komenského, 1936 [Václav Příhoda with the participation of J. Trajer, M. Disman and M. Kiihnelova: *Praxe školského měření* (Practice of school measurement. Testing in the national school), Praha, Dědictví Komenského, 1936], «Popotnik», vol. LVII, n. 9-10, 1935/36, p. 237.

⁷⁶ G. Šilih, *Sergej Hessen, Globalní metoda či globální vyučování? – Příspěvek k filosofii počátečního vyučování*. – V Praze 1935. Nákladem Dědictví Komenského [Sergej Hessen – global method or global education?], «Popotnik», vol. LVII, n. 3-4, 1935/36, p. 69.

Although the Slovene teachers managed to incorporate some didactic features of reform pedagogy into school legislation (together with pedagogues from all parts of Yugoslavia), they were utterly unsuccessful in reforming the school in the spirit of a unified school (undifferentiated education at the lower secondary level). Instead, they followed with the greatest interest the reform developments in Czechoslovakia, where modern educational aspirations were realized in the school practice of experimental schools. Based on the presented cooperation between Slovene and Czech pedagogues, we can conclude that this cooperation significantly enriched (especially) Slovene educational thought between the two wars. The second conclusion is that Czech-Slovenian cooperation, which we can consider among teachers, was not the case among Czech and Slovenian representatives of educational sciences. While the Czech and Slovenian teachers had joint contacts and discussions, the cooperation in scientific discussion was rather weak among the Czech and Slovenian pedagogues and quite different in terms of scientific orientation.

Herbartianism as an eastern central European phenomenon and its reception in Hungary

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ABSTRACT: The development of the institutional system of Hungarian pedagogy is closely connected with the fundamental peculiarities of the economic, social and political development of the Central European region. At Hungarian universities the theological and later educational-philosophically oriented theoretical pedagogy became institutionalized according to German patterns, and in the last third of the 19th century theoretical pedagogy began developing in the other countries and imperial-royal republics of the region. Monarchy modernized the education system on the basis of the pedagogical principle of Herbartianism. Almost everywhere the representatives of Herbartian pedagogy occupied the pedagogical chairs established at universities and determined the rhetoric for institutionalizing university pedagogy. It follows from these facts that the history of pedagogy and teacher training at Hungarian scientific universities can be interpreted as the history of reception. In the background are the various claims to modernization, the challenges and reform ideas of successive reform periods in the development of the Hungarian nation-state.

EET/TEE KEYWORDS: Herbartianism; Hungarian reception; Theoretical pedagogy; Teacher training; Eastern Central Europe; XIXth Century.

Introduction

The paper takes an analytical look at the basic institutional and procedural characteristics, periods and protagonists of Hungarian Herbartianism as a university pedagogy in the mirror of its regional and national components. The

first part of the paper sketches the East Central European concept and, within the framework of a brief historiography, surveys Herbartianism research in the region. The following two sections will deal with the establishment of German university pedagogy in the spirit of Herbartianism on the one hand, and with the characteristics of its reception in the Austrian monarchy on the other. The study will focus on the common historical features and characteristics of the region, then on higher education and Herbartianism in the Habsburg Monarchy. Subsequently, the country-specific characteristics of Herbartianism in Hungary are examined, highlighting that this so-called Hungarian component of university development and also the establishment of Herbartianism can also be understood as a history of reception strongly co-determined by the historical, political and social circumstances of this region.

1. *Herbartianism Research in East Central Europe*

At the beginning of the 21st century, a new interest in the history of Eastern Europe developed in historical research. Within this framework, a discussion began on the boundaries and on the general and educational-historical structural features of the historical regions of Central Europe, which, in addition to the term Central Europe, also brought the term East Central Europe to the fore. As demonstrated in the preface to the two-volume *Studienhandbuch Östliches Europa*¹ (Study Guide Eastern Europe), «Eastern European History» needed to be expanded as an independent discipline. «Geschichte Ostmitteleuropas» can and should serve as a link between German and East Slavic history within this framework, with the «History of Southeast Europe», however, as a link to the spaces of Orthodoxy and Islam there². The thematic field of East Central Europe already offers numerous research results, which have been manifested in the multifaceted activity of several research institutes and university research centres, as well as in specialist journals, scientific monographs and anthologies of the areas in question³.

¹ H. Roth (ed.), *Studienhandbuch Östliches Europa, Band 1: Geschichte Ostmittel- und Südosteuropas*, Köln et al., Böhlau Verlag, 2009.

² *Ibid.*, p. VII.

³ The most important centres include the Leibniz-Institut für Geschichte und Kultur des östlichen Europa (GWZO) in Leipzig, as well as the Herder-Institut für historische Ostmitteleuropaforschung (HI) in Marburg, the Nordost-Institut für Kultur und Geschichte der Deutschen in Nordosteuropa and the affiliated institute of the University of Hamburg in Lüneburg, the Bundesinstitut für Kultur und Geschichte der Deutschen im östlichen Europa (BKGE) and its affiliated institute of the Carl von Ossietzky University in Oldenburg, the Collegium Carolinum in München, and the Simon-Dubnow-Institut in Liepzig.

The handbook of Eastern Europe focuses more on the historical characteristics of the concept of space. In this sense, the region of East Central Europe includes the countries of present-day Poland, the Czech Republic, Hungary and Slovakia with their historical commonalities and interconnections. In a broad sense, East Central Europe includes a broad territory between the Baltic Sea and the Adriatic Sea, which is based on the Christianisation carried out by the Latin Western Church and historically formed in its temporally changing borders and ethnic compositions. East Central Europe is a historical and cultural region with common historical characteristics, which stands out from the neighbouring large historical regions in both the West and the East⁴. According to Winfried Eberhard, it is «a zone of historically long-term, particularly intensive German-Slavic and German-Magyar contact and transfer»⁵.

The results of research on East Central Europe also make it possible to sketch an overview from the point of view of the educational-historical approach to the region, which has numerous common historical-state foundations rooted in the Middle Ages. The core of this early medieval tradition is the «early triad of nation-states»⁶ of Roman-Christian national kingdoms in Bohemia, Poland and Hungary (Premyslades, Piasts and Árpád), whose canonised members (kings and kings' daughters and kings' sons) are venerated as political healers and patrons of the nation to this day. After the extinction of the medieval ruling dynasties, the influence of the regionally anchored nobility grew in the East Central European estates (Hungary, Bohemia and Poland). Since the 17th and 18th centuries, these countries continued to confront the great empires (Ottoman and Habsburg), and were subsequently incorporated into them. From the Middle Ages onwards, the region had been under the control of the East Frankish-German imperial church, then, through expansion, experienced a strong German dominance in trade and urban crafts. The larger cities had considerable German minorities. In addition to the economic products, this German transfer also brought the Greek-Latin educational ideal, and new values and thoughts from different historical epochs up to the Enlightenment were transported. The reception of German philanthropism also came to the fore in the educational reforms of enlightened absolutism⁷. At the same time, these countries maintained a significant potential for resistance, the historical power of which came to the fore in the age of national and social emancipation movements⁸. The national upswing was carried far and wide by a revivalist

⁴ J. Bahlcke, *Ostmitteleuropa*, in H. Roth (ed.), *Studienhandbuch Östliches Europa, Band 1: Geschichte Ostmittel- und Südosteuropas*, Köln et al., Böhlau Verlag, 2009, p. 59.

⁵ *Ibid.*, quote from W. Eberhard.

⁶ Quote from Christian Lübke in J. Bahlcke, *Ostmitteleuropa*, cit., p. 60.

⁷ A. Karger, *Ostmitteleuropa. Zur Entwicklung eines Raumbegriffs*, «Der Bürger im Staat», vol. 47, pp. 47-49.

⁸ A. Helmedak, H. Roth, *Das Habsburgreich*, in H. Roth (ed.), *Studienhandbuch Östliches Europa, Band 1: Geschichte Ostmittel- und Südosteuropas*, Köln et al., Böhlau Verlag, 2009, pp. 199-200.

nationalism which, with certain phase shifts in the individual sub-areas, became the leading ideology of the epoch⁹.

In this political field of forces, alongside the hegemony of the Prussian-German, Austrian and, after the equalisation, Austro-Hungarian monarchies, Herbartianism established itself as the leading ideological-political and pedagogical direction of the 19th century, the effect of which can be seen not only in school development and educational policy, but also in the professionalisation of the various pedagogical professions and in the development of the sciences¹⁰. Therefore, the impact of Herbart and Herbartianism on German-speaking areas and East Central Europe represents a very important research topic for historians of education to investigate. At the centre of the coordination and research on the topic is the Herbartianism Research Centre at the University of Duisburg-Essen, belonging to the Chair of General Didactics¹¹. In addition to basic research, which is devoted to Herbart's philosophical and pedagogical legacy, alongside the study of Herbart and Herbartianism from different perspectives, the research centre focuses on the worldwide reception history of the approach¹². Online databases provided by the Research Centre enable follow-up research and various approaches to enquiry with the help of filtered and categorised material. The Research Centre works in constant cooperation with the International Herbart Society, whose members are recruited from 14 countries¹³. In addition to the biennial international symposia and the associated conference proceedings, the society also promotes young researchers.

Since the influence of Herbart and Herbartianism had a general impact on the educational reforms and pedagogical innovations of Western and Eastern European and non-European countries in the 19th century, an important field of research is the reception history of the movement. The interest in Herbart's

⁹ The earlier discussion with an educational-historical view see H.E. Tenorth, *Erziehungswissenschaft in Mitteleuropa*, in K.P. Horn *et alii* (edd.), *Erziehungswissenschaft in Mitteleuropa – aufklärerische Traditionen – deutscher Einfluss – nationale Eigenständigkeit*, Budapest, Osiris, 2001, pp. 32-37; A. Németh, *Die ungarischen Bildungsreformen*, in F. Imling *et alii* (ed.), *Schule und Reform*, Wiesbaden, Springer, 2018, pp. 106-107; A. Németh, *Herbartianische Einflüsse auf die ungarischen Bildungspolitik nach 1867*, in K. Grundig de Vazquez, A. Schotte (edd.), *Erziehung und Unterricht*, Paderborn, Ferdinand Schöningh, pp. 240-241; A. Németh, *Die Entwicklungsperioden der ungarischen Erziehungswissenschaft im 19. und 20. Jahrhundert*, in Á. Fischer-Dárdai *et alii* (edd.), *University and Universality*, Pécs, University Library of Pécs, 2017, pp. 309-315.

¹⁰ Németh, *Die ungarischen Bildungsreformen*, cit., p. 107; Tenorth, *Erziehungswissenschaft in Mitteleuropa*, cit., pp. 30-33.

¹¹ A detailed list of publications on the topic of Herbartianism can be seen on the homepage, Last updated: 12.12.2020, <<https://www.uni-due.de/allgemeine-didaktik/index.php>> (last access: 10.15.2018).

¹² For the research focus of the unit, see the homepage, Last updated: 12.12.2020, <<https://www.uni-due.de/herbartianismus-forschungsstelle/structure.php>> (last access: 10.10.2020).

¹³ Homepage of Herbart Gesellschaft, Last updated: 12.12.2020, <<https://www.herbart-gesellschaft.de>> (last access: 10.10.2020).

pedagogical life work and in Herbartianism was awakened with a new vigour in the last few decades through the initiatives of primarily German researchers. In this period, the Herbart conferences in Oldenburg were followed by the international conferences organised in Jena with the participation of foreign researchers (representing England, the USA, Japan, Switzerland, Hungary and Bulgaria)¹⁴. Another effect related to this general Western and non-European reception characterised these processes in the East Central European region. According to Adam's analyses¹⁵, systematic research on Herbartianism in the monarchy also began from the point of view of the successor states in the 1990s. During this period, the first conferences on this topic were organised in Jena, and were attended by Austrian¹⁶, Hungarian¹⁷, Slovenian¹⁸, Czech and Bulgarian¹⁹ researchers. In 2006, a conference was organised at the Alpen-Adria University in Klagenfurt with the participation of researchers from Germany, Slovenia and Hungary²⁰. This topic has then been the subject of an Austro-Hungarian research project since 2007. In the course of the project, in addition to Herbartianism, currents oriented towards life and reform pedagogy were also investigated²¹. Another conference in Milan also reflected the theme in an Italian focus on the Habsburg Empire²².

In the following sections, according to these research results the establishment of the German university pedagogy of Herbartianism and the characteristics of

¹⁴ See in detail the articles of R. Coriand, M. Winkler (edd.), *Der Herbartianismus – die vergessene Wissenschaftsgeschichte*, Weinheim, DSW, 1998; R. Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung*, Bad Heilbrunn, Klinkhardt Verlag, 2003.

¹⁵ E. Adam, G. Grimm, *Einleitung: Der Herbartianismus in der Habsburgmonarchie – ein Desiderat der historisch-pädagogischen Forschung*, in Idd. (edd.), *Die Pädagogik der Herbartianismus in der Österreichisch-Ungarischen Monarchie*, Berlin, Lit Verlag, 2009, pp. 1-4.

¹⁶ E. Adam, *Herbartianismus in Österreich – seine Bedeutung für eine transnationale LehrerInnenbildung*, in R. Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung*, Bad Heilbrunn, Klinkhardt Verlag, 2003, pp. 181-204.

¹⁷ A. Németh, *Der Einfluss des Herbartianismus an der Budapester Universität und seine Rolle in der Lehrerbildung – Eine Fallstudie*, in Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung*, cit., pp. 225-244.

¹⁸ E. Protner, *Pädagogischer Takt und Lehrerpersönlichkeit in herbartianischen Konzepten der Lehrerbildung*, in Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung*, cit., pp. 205-224.

¹⁹ A. Tschavdarova, *Die pädagogische Bildung in Bulgarien zwischen Herbartianismus und politischen Umbrücken*, in Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung*, cit., pp. 101-116.

²⁰ E. Adam, *Die Pädagogik des Herbartianismus in der Österreichisch-Ungarischen Monarchie. Eine Forschungsskizze*, in E. Adam, G. Grimm (edd.), *Die Pädagogik der Herbartianismus in der Österreichisch-Ungarischen Monarchie*, Berlin, Lit Verlag, 2009, pp. 5-20.

²¹ J. Hopfner, A. Németh (edd.), *Pädagogische und kulturelle Strömungen in der k.u.k. Monarchie, Lebensreform, Herbartianismus und reformpädagogische Bewegungen*, Frankfurt am Main, Peter Lang Verlag, 2008.

²² S. Polenghi (ed.), *La scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, SEI Editrice, 2012.

its reception in East Central Europe from the perspective of university pedagogy will be analytically surveyed.

2. Characteristics of German Herbartianism

The transformations of the French Revolution and Napoleon's conquests also devastated the universities in Europe, which had traditionally, through the support of Catholic or Protestant rulers, taught more or less the same branches of knowledge in generally four classical faculties. After the fundamental political transformation, two new university models appeared at the beginning of the 19th century, opening the way for a fundamental reform of the traditional university. The French model of special colleges, subjected to strict, often military discipline, was organised and controlled by an enlightened despotism that regulated the curriculum down to the last detail, including the awarding of degrees, conformity of views to official doctrines and even personal habits. Although its essential features, such as the centralisation of state control, the isolation of faculties and the establishment of specialised schools were implemented thanks to the Revolution and completed by Napoleon, it remained in force under successive French regimes. When in 1806 Napoleon created under the name of the "Imperial University" an institution exclusively responsible for teaching and public education throughout the Empire, the official who directed it reported directly to the Emperor and enjoyed great independence. This central administration was expanded by later political regimes to become the Ministry of Education²³.

The German model bears the name of the scholar and statesman Humboldt von Wilhelm (1767-1835), who played a very important role in the foundation of a new university in Berlin by the King of Prussia in 1810 based on preferential ideas. The nature of studies, the content of teaching and the university's relationship to the authorities were to be characterised by «freedom». According to Humboldt, the state had only two tasks to fulfil with regard to universities: to protect their freedom and to appoint professors. The introduction of students to scientific research through seminars and laboratories also got underway. By the end of the century, the German model of the modern university had been established not only in Europe but also in the United States and Japan. In the course of the 19th century, universities in continental Europe became increasingly subject to state bureaucracy. Following the French and Prussian examples, ministries of education were then established. The

²³ W. Rüegg (ed.), *A History of the University in Europa, Universities in the nineteenth and Early Twentieth Centuries (1800-1945)*, 3 vols., Cambridge et al., Cambridge University Press, 2004, Vol III, pp. 3-4.

ministerial administration also regulated access to universities and controlled their curricula and examinations, equipping them with modern buildings and laboratories. The most important consequence of this process was the professionalisation of university professions. On the European continent, the professor became an official of the secular and bureaucratic state. His personal prestige increasingly depended on the collective prestige of his professional or scientific specialisation²⁴.

One result of the German university reform was the emancipation of the newly founded Faculty of Arts, which from this time onwards, in addition to the humanities and philosophy, also became an important place for teacher training for the higher teaching profession. This marked the beginning of the separation of the teaching profession from the clerical office and the establishment of teaching as an independent profession. The reform of the university also changed the competencies of the grammar school teacher, which focused on the subject sciences. This was reflected in the introduction of the profession-qualifying state examination in 1810 (examen pro facultate docendi) and the Abitur examination in 1812 in Prussia²⁵.

The Humboldt Model established a new ideal of science with philosophy as the basic science on which the scientific disciplines could base their findings. The specialisation of the humanities disciplines meant new possibilities in communication, identification and the reputation of professors. This philosophical underpinning characterised the theoretical pedagogy cultivated at German universities, founded at the beginning of the 19th century by Friedrich Daniel Ernst Schleiermacher (1768-1834) and Johann Friedrich Herbart (1776-1841).

Schleiermacher was a member of the founding commission, then as full professor of theology and philosophy and the founding dean of Berlin University. He then also participated in the Prussian educational and state reform in the spirit of Neuhumanism, and was elected a member of the Royal Prussian Academy in 1810. His scientific activity focused on theology and philosophy, but he had significant drafts on hermeneutics: he dealt with state theory and with hermeneutically conceived pedagogy, on which he gave numerous lectures between 1813 and 1826. His pedagogical theory was based on the same cultural starting point as Herbart's, but he was not primarily guided by the means-ends dichotomy of education and instruction, but by a dialectical mediation against a Platonic-Christian background on the ethical idea of the highest good and its historical concretisation in human reality. Within a methaphysical framework

²⁴ *Ibid.*, pp. 5-8.

²⁵ O. Graumann, *Aspekte der Geschichte westeuropäischer Lehrerbildung*, International Dialogues on Education, «Past and Present (IDE Online Journal)», vol. 1, n. 1, 2014, Last updated: 10.12.2020, <<https://www.ide-journal.org/article/graumann-geschichte-westeuropaischer-lehrerbildung>> (last access: 04.05.2016); S. Blömeke, *Lehrerausbildung*, in S. Blömeke *et alii* (edd.), *Handbuch Schule*, Bad Heilbrunn, Klinkhardt, 2009, pp. 483-490.

of history, Schleiermacher designs an educational theory of the moral person in the sense of helping human beings to become individuals²⁶.

According to Schleiermacher, human development is the result of the interaction of external influences and inner self-development («external influences and inner developmental principle»)²⁷. In doing so, he distances himself sharply from Herbart's conception and at the same time from the unlimited pedagogical optimism of the Enlightenment by, on the one hand, pointing out the importance of the internal conditions of education and the importance of individual characteristics, and on the other hand, by recognising that education is not omnipotent. It resolves the contradiction between omnipotence and limited educational powers (as two absolutely extreme ideas) by accepting the «indecision of anthropological conditions» as the starting point for education²⁸. It follows that one must create a pedagogy that remains effective even in these extreme cases. This is achieved by the educator by relying on the self-activity that occurs from the moment a person is born. Although he did not have nearly as strong an impact on pedagogy and schools as Herbart, he was instrumental in influencing humanistic pedagogy and its hermeneutic research methodology in the first half of the 20th century²⁹.

Herbart was also in intensive contact with the intellectual currents and the most important personalities of his era. He was born in Oldenburg, died in Göttingen, and studied with Fichte and Schiller from 1794-1797; as a tutor in Switzerland he also met Pestalozzi, then acquired a teaching licence in Göttingen and a professorship for philosophy and education there. In 1819 he was called to Königsberg as Kant's successor. There he was professor of philosophy until 1833, after which he returned to Göttingen. According to Herbart's anthropology, man is perfectible in the Rousseauian sense. Man is capable of evil and good, but since his development is not predetermined by nature, education must provide the material and content³⁰. The starting point for a pedagogical science is the fact that there are different educational concepts: the concern of a scientific pedagogy is to provide a scientific rationale for pedagogical practice. This justification means the reduction of propositions about practice to established principles. When principles of pedagogical action are established, the question of methods is referred back to philosophy, whose task is to provide the highest standards and values for the exhibition of

²⁶ W. Böhm, *Pädagogik*, in D. Benner, J. Oelkers (edd.), *Historisches Wörterbuch der Pädagogik*, Weinheim, Basel, Beltz Verlag, 2004, p. 774; B. Fuchs, *Von der individuellen Eigentümlichkeit zur Person. Überlegungen im Anschluss an Schleiermacher*, «Vierteljahrsschrift für wissenschaftliche Pädagogik», vol. 73, p. 236.

²⁷ F.D., *Schleiermacher, Vorlesungen aus dem Jahre 1826*, in C. Platz (ed.), *Schleiermachers Pädagogische Schriften*, Langensalza, Beyer & Mann, 1902, p. 16.

²⁸ Böhm, *Pädagogik*, cit., p. 16.

²⁹ *Ibid.*, p. 17.

³⁰ H.U. Musolf, S. Hellekamps, *Geschichte des pädagogischen Denkens*, München et al., Oldenbourg Verlag, 2006, pp. 91.

educational goals. The task of psychology is to identify measures and obstacles to the achievement of educational goals³¹.

The school was expanded in the second half of the 19th century on the basis of compulsory general education. The attempt to organise and scientifically justify general education was undertaken by Herbart's successors. These German scientists and schoolmen formed the group of Herbartians who, as practically oriented experts, made Herbart's concept of educative teaching workable for the classroom³². They developed their own system designs and strove to professionalise pedagogical practice by ensuring that teacher trainees at universities were offered educational science content and practical school exercises in addition to subject-specific studies.

Tuiskon Ziller (1817-1882) became a grammar school teacher after studying classical philology and philosophy in Leipzig. He then extended his education in Leipzig to include law and national economics and habilitated in law in 1853, becoming an associate professor in 1864. In 1862, he founded his pedagogical seminar with a practice school and developed his formal grade theory there. In 1868 he was a co-founder of the Association for Scientific Pedagogy. Ziller trained numerous teachers, including Rein³³. Wilhelm Rein (1847-1929) studied theology and education at the University of Jena, and in 1869 he joined Ziller's pedagogical seminar in Leipzig. After teaching for some time, he completed his doctorate at the University of Rostock, and from 1876 he was director of the teacher training seminar in Eisenach, where he developed a methodology of elementary school teaching that was published in eight volumes entitled *Theorie und Praxis des Volksschulunterricht nach Herbartischen Grundsätzen* (Theory and Practice of Elementary School Teaching According to Herbartian Principles). In 1886, Rein became an honorary professor of education in Jena, where, in addition to the university, he established a training school for teacher education and teacher training. The *Enzyklopädisches Handbuch der Pädagogik* (Encyclopaedic Handbook of Pedagogy), with two supplementary volumes published by Rein with the participation of over 300 contributors from 1894 to 1899, was a basic work of general pedagogy³⁴.

Rein was the co-founder and director of the Jena Summer Courses, which was later organised for teachers and other interested people from around the world. As a result, Jena University, which extended the activities of the founding fathers Stoy and Ziller in Halle and Leipzig, became the epicenter of the worldwide spread of Herbartianism. In the last third of the 19th century, there was hardly a state in Europe that was not represented by at least one member in Rein's university seminar or in the Jena Summer Courses. In addition,

³¹ E. König, P. Zedler, *Theorien der Erziehungswissenschaft*, Weinheim, Beltz, 1998, pp. 11-25.

³² Musolff, Hellekamps, *Geschichte des pädagogischen Denkens*, cit., p. 105.

³³ *Ibid.*, pp. 105-106.

³⁴ *Ibid.*, pp. 122-123.

numerous students came from Eastern and Central European countries, but also from the United States, South America, Japan and Australia. Jena became an international Mecca of pedagogy. From 1912 onwards, all courses were held at the university. The courses were paused during the war years and were offered again from 1920. Rein continued the summer courses after his retirement in 1923³⁵.

The spread of the German movement can be divided into several often rival schools, which the Hungarian author Lajos Glockner divided into four directions in his 1905 dissertation: the independent followers of theoretical principles (Strümpell, Waitz, Lindner, Willmann, etc.), the independent followers of practical principles (Brzoska, Dörpfeld, etc.), the Ziller school (Vogt, Rein, Glöckner, etc.) and the Stoy school³⁶. The fact that Herbartian pedagogy spread all over the world and was able to become a state pedagogy in East Central Europe thanks to the Habsburg Monarchy is connected with the centralist educational policy, as well as with the political, socio-cultural and economic conditions of the region. On the one hand, this pedagogy was conservative, in accordance with Herbartian static metaphysics with its emphasis on self-preservation in the face of currents, and on the other hand, it could therefore serve well in educational reform³⁷.

3. *Herbartianism in the Habsburg Monarchy*

The modern education and higher education systems of the East Central European nation states founded in the 19th and 20th centuries, including Hungary, have their common roots in the broad educational and higher education reforms of Maria Theresa and Joseph II in the last third of the 18th century. Until then, the various confessions were active in their own sphere of influence, fulfilling their characteristic tasks for the school system and for the university of the estates society within the traditional framework that had developed over centuries, the principles of which were to be applied equally to all countries of the monarchy³⁸.

³⁵ W. Lütgert, *Wilhelm Rein und die Jenaer Ferienkurse*, in Coriand, Winkler (edd.), *Der Herbartianismus – die vergessene Wissenschaftsgeschichte*, cit., pp. 222-225; A. Németh, *Die ungarischen Teilnehmern der Jenaer Ferienkurse und ihre Rolle in der Gründung der Universitätspädagogik und in der Lehrerbildung*, in R. Bolle, K. Grundig de Vazquez (edd.), *Herbart und Herbartianismus in Jena*, Gera, edition Paideia, 2020, pp. 147-148.

³⁶ L. Gockler, *La Pédagogie de Herbart. Thèse pour le doctorat d'université présentée à la Faculté des Lettres de Paris*, Paris, Librairie Hachette, 1905, p. 396.

³⁷ Adam, *Die Pädagogik des Herbartianismus*, cit., pp. 11-12.

³⁸ H. Engelbrecht, *Geschichte des österreichisches Bildungswesen. Von der frühen Aufklärung bis zum Vormärz*, 3 vols., Wien, ÖBV, 1984, Vol. III, pp. 89 ff.; J. Puttkamer, *Schulalltag und nationale Integration in Ungarn*, München, Oldenbourg Verlag, 2003, p. 70; Németh, *Die*

This epoch of reform and modernisation in the spirit of enlightened absolutism was followed by a period of impact from the political ideas of the French Revolution; then came the Napoleonic wars, which also shook the territorial shape of the monarchy. With the Congress of Vienna in 1815, a new balance of power was achieved in Europe; but with this period of burgeoning nationalism, new political and cultural tensions arose in the multi-ethnic monarchy. University development in the countries and regions of the monarchy was affected by territorial changes and by state efforts to control teaching and the structure of institutions. After the territorial changes surrounding the Congress of Vienna, the Monarchy had two traditional universities founded in the 14th century in Prague (1348) and Vienna (1365), and in addition, since the 16th and 17th centuries respectively, there were smaller universities founded in the course of the Counter-Reformation. In the course of the Counter-Reformation, smaller universities were founded in Olmütz (1566), Graz (1585) and Innsbruck (1669) by the Jesuits, in Salzburg (1622) by the Benedictines, in Galicia the University of Lemberg (1784), and the third partition of Poland in 1795 added Krakow (1364). At the Congress of Vienna in 1815, the Italian Habsburg possessions were granted as a Lombardo-Venetian kingdom, which included Padua (1222) and Pavia (1361). The universities in the kingdoms of Hungary, Croatia and Slavonia and in the Grand Duchy of Transylvania, which were administered by the Hungarian Court Chancellery in Vienna, were a special case. These include the oldest university in the territory of the Hungarian kingdom in Tyrnau (Slovak Trnava, Hungarian Nagyszombat), founded in 1635 by Péter Pázmány, Archbishop of Esztergom as a Jesuit college, which was the Royal Hungarian University from 1784³⁹.

From the point of view of pedagogy, the reorganisation of studies in 1805 required students to attend four hours of teacher training courses at the faculties of philosophy. From this time onwards, educational science chairs were quickly established and staffed throughout the Monarchy. The first were established in 1806 at the universities of Vienna and Prague. In the following years, schools of pedagogy in universities from Padua to Lemberg (i.e. from Italy to the Ukraine) had their chairs appointed by the Austrian Monarchy⁴⁰. During this period, the influence of Vincenz Eduard Milde (1777-1853), who was the first holder of the newly founded Chair of Education in Vienna from 1806 to 1810, was fundamental in the field of teaching education in the Monarchy. His work

ungarischen Bildungsreformen, cit., p. 108.

³⁹ The university, which moved from Tyrnau to Buda in 1777, to Pest (part of today's Budapest) in 1784, was from then on called Royal Hungarian University.

⁴⁰ See detailed W. Brezinka, *Pädagogik in Österreich. Geschichte des Faches an den Universitäten von 18. bis zum Ende des 20. Jahrhunderts*, Wien, ÖAV, 2000, Vol I, pp. 98-100; A. Németh, *Die Universitätspädagogik und Milde's Rezeption in Ungarn in der ersten Hälfte des 19. Jahrhunderts*, in I.M. Breinbauer et alii (edd.), *Milde revised*, Wien, Litt Verlag, 2006, pp. 147-148.

Lehrbuch für allgemeine Erziehungskunde (1811-1813) was the only textbook for pedagogy used in all the universities of the Monarchy until 1848⁴¹, but in the 1830s Herbart's reception also began in Austria.

The first centre of Herbartianism was the University of Prague, where Franz Exner was the first to teach and thus spread Herbart's philosophy from 1831 to 1848. It was Exner who advocated the appointment of the Herbartian Franz Karl Lott at the University of Vienna, whose student was Theodor Vogt, who in 1868 was the first in Austria to habilitate in the subject of education and was appointed professor of education at the University of Vienna in 1871. At the same time, Herbartians were also working at the University of Prague. A student of Exner, Gustav Adolf Lindner, was active at the Czech University and Otto Willmann at the German University. After 1850, Herbartianism remained an important direction at Prague University. Three Bohemian psychologists, Frantisek Cupr, Wilhelm Fridolin Volkmann and Gustav Adolf Lindner, authored textbooks on empirical psychology which were used throughout the monarchy⁴².

After the direct influence of Herbartianism had begun at the Austrian university and in the school system from 1848, the Austrian educational reforms in the second half of the 19th century were also influenced by Herbartianism. In 1849, Franz Exner and Hermann Bonitz drew up a draft for the organisation of grammar and secondary schools in Austria, which had a lasting effect in all parts of the monarchy. The reform not only affected secondary schools, but also restructured higher education with the introduction of the Humboldtian university model. Herbart's Austrian followers played a significant role in ensuring that Herbart's influence was not only felt in the principles used in compiling teaching material according to the arrangement, but that his philosophy became the dominant trend in Austrian philosophy in the second half of the 19th century⁴³. After the plan had been implemented, Bonitz devoted himself to training teachers who would comply with the ideas. At the University of Vienna, he organised what later became a Philological Seminar. With the later founding of the Seminars for Mathematics and Natural Sciences, the organisational framework for the independent specialist training of grammar school teachers was created⁴⁴.

The compulsory schooling proclaimed in 1855, on the other hand, had to remain a declaration of intent for a long time, as a far-reaching reorganisation of the elementary school system that could have ensured nationwide school provision was not carried out⁴⁵. In 1869, a Volksschulreform began with

⁴¹ Adam, *Die Pädagogik des Herbartianismus*, cit., p. 10.

⁴² *Ibid.*, pp. 10-13.

⁴³ *Ibid.*, p. 11.

⁴⁴ Németh, *Der Einfluß des Herbartianismus*, cit., pp. 228-229; Id., *Die ungarischen Bildungsreformen*, cit., pp. 112-113; Id., *Der Herbartianismus*, cit., pp. 97-98.

⁴⁵ Puttkamer, *Schulalltag*, cit., p. 72.

the Reichsvolksschulgesetz (Imperial People's School Act), which met with resistance from conservative circles due to the nationalisation of schools and the deconfessionalisation of school supervision. The law applied to all crown lands of the monarchy, with the exception of Hungary⁴⁶.

Adam's analyses reveal that although Herbartianism established itself as the leading direction of the monarchy in the second half of the century, there are also several conflicts in the background of its success story. The dogmatism of the so-called Ziller School and the role of the Association for Scientific Pedagogy led to several discussions and conflicts⁴⁷. These conflicts often had a religious background in addition to rivalry. An example of this is that Ziller's Catholic successor, Theodor Vogt was a university professor of education from 1871, and an opponent of Herbartianism, the anticlerical liberal, Protestant Friedrich Dittes headed the newly founded teacher training college, Pädagogium, subordinated by the Vienna Municipal Council from 1868 to 1881. However, the director of the training school was replaced by a Catholic, Otto Willmann (1839-1920), who then held this position for four years until his appointment at the German Karl-Ferdinand University in Prague for philosophy and pedagogy⁴⁸.

After taking up his post, Willmann endeavoured to organise a university pedagogical seminary with a training school based on the Leipzig model. Then, with the compromise in 1876, the Prague Pedagogical University Seminary was opened. Its lectures represented (through General Pedagogy, Encyclopaedia of Pedagogy, Didactics, Didactics of Grammar Schools, Historical Pedagogy and the related Pedagogical Seminar) the Central European university pedagogy of that time. They provided models to other universities in the region for the structure and teaching of pedagogy. His two-volume magnum opus entitled *Didaktik als Bildungslehre nach ihren Beziehungen zur Socialforschung und zur Geschichte der Bildung* (1894-1895) (Didactics as a Theory of Education in Relation to Social Research and the History of Education) attracted a great deal of international attention and was translated into several languages⁴⁹. Willmann's work is a successful example of the synthesis of Herbartianism into a Christian pedagogy «according to its universality of spirit as the greatest possible breadth, depth and order, religion included»⁵⁰. He is represented with the standpoint «that moral sciences such as pedagogy are philosophical in

⁴⁶ See further details in E. Adam, *Herbartianismus in Österreich – seine Bedeutung für eine transnationale LehrerInnenbildung*, in Coriand (ed), *Herbartianische konzepte der Lehrerbildung*, cit., pp. 184-186.

⁴⁷ Adam, *Die Pädagogik des Herbartianismus*, cit., p. 13.

⁴⁸ *Ibid.*, p. 15.

⁴⁹ R. Coriand, *Karl Volkmar Stoy (1818) – Otto Willmann (1839 – 1920)*, in B. Dollinger (ed.), *Klassiker der Pädagogik*, Wiesbaden, VS Verlag, 2006, pp. 164-165.

⁵⁰ *Ibid.*, p. 37.

nature and have, in addition to their historical character, a speculative and normative character»⁵¹.

Another characteristic of Herbartianism is its reception in the regions (today's Slovenia, Slovakia, Croatia, Romania, etc.) where numerous small and medium-sized peoples and nations had a new chance to establish independent nation-states after the Austro-Hungarian Monarchy receded at the end of the First World War. It can be seen that this circle also included numerous successors of the German and Austrian Herbartians, who were important as pedagogical heroes in underpinning the new nation-state educational policy and school practice in the successor countries of the Habsburg Monarchy. Through the articles of Edvard Protner we have a vivid picture of the conditions and periods of the reception of Herbartianism in the region of today's Slovenia, in Maribor and Ljubljana, and the conflicts in the other areas of the monarchy between the catholic conservatism in the person of Anton Mahnic and the renowned liberal Herbartian Gustav Adolf Lindner⁵². As can be seen in the previous section, Herbartianism had the greatest impact among the Czechs⁵³. But from the centre to the periphery, from Croatia to Bulgaria⁵⁴, Macedonia⁵⁵, Bosnia and Herzegovina⁵⁶ and Montenegro⁵⁷, it has also had an impact. As can be seen in Radeka's in-depth analyses, Croatian Herbartianism (e.g. at the University of Zagreb), in the vicinity of the Illyrist movement and Pan-Slavism, was a significant factor in the establishment of different national identities, teacher training and mother-tongue education⁵⁸.

⁵¹ *Ibid.*

⁵² E. Protner, *Die Formalstufen und die „Verdammung“ des Herbartianismus am Beispiel Sloweniens*, in E. Adam, G. Grimm (edd.), *Die Pädagogik der Herbartianismus in der Österreichisch-Ungarischen Monarchie*, Berlin, Lit Verlag, 2009, pp. 131-146.

⁵³ Rydl, *Herbartianismus als schulpädagogisches Konzept*, cit., pp. 55-61.

⁵⁴ Tschavdarova, *Die pädagogische Bildung*, cit., pp. 101-116; A. Tschavdarova, *Die Etablierung der Lehrerbildung in Bulgarien im Kontext des Herbartianismus*, in T. Kasper, E. Skiera, G. Grimm (edd.), *Lehrerbildung im europäischen Kontext*, Bad Heilbrunn, Klinkhardt, 2019, pp. 193-202.

⁵⁵ S. Miovska-Spasova, *Teacher Education in the Period of the National Enlightenment in Macedonia*, in Kasper, Skiera, Grimm (edd.), *Lehrerbildung im europäischen Kontext*, cit., pp. 203-210.

⁵⁶ S. Šušnjana, *The Beginning of Regular Teacher Education in Bosnia and Herzegovina*, in Kasper, Skiera, Grimm (edd.), *Lehrerbildung im europäischen Kontext*, cit., pp. 211-218.

⁵⁷ V. Zorič, *The Professional development, Schooling and Specialisation of primary School Teachers in Montenegro until the First World War*, in Kasper, Skiera, Grimm (edd.), *Lehrerbildung im europäischen Kontext*, cit., pp. 219-228.

⁵⁸ I. Radeka, *Der Herbartianismus im Kontext der Entwicklung der Pädagogik in Kroatien*, in Adam, Grimm (edd.), *Die Pädagogik der Herbartianismus in der Österreichisch-Ungarischen Monarchie*, cit., pp. 131-145.

4. *Herbartian educational model and university pedagogy in the service of the nation*

The fundamental determinant of Hungarian development was that the Hungarian lands of the Crown of St. Stephen (the Kingdom of Hungary, the Principality of Transylvania, as well as Fiume and Croatia-Slavonia) had been given a special status within the Habsburg Empire since the repulsion of the Turks. The Habsburgs did not succeed in eliminating the resulting Magyar self-awareness and traditions of national independence, but it came to the fore again from the end of the 18th century in the period of revival nationalism. In this phase, Hungary was the only example of an independent nation-state with the help of consistent Magyarisation⁵⁹.

From this point of view, for Hungary the period of the Theresian-Josephinian reforms meant not only the epoch of incipient modernisation but an early phase of the national movement, which unfolded until 1848 as a cultural and political reform movement with a liberal profile. Its objective was the pursuit of national independence, statehood and territorial integrity, and the establishment of a modern constitutional state with Hungarian as the state language⁶⁰. In 1844, Hungarian was elevated to the status of official language. The use of the mother-tongue in elementary and secondary schools in Hungary already gave important impulses to the written and national languages in the first half of the century⁶¹.

The Hungarian Revolution of 1848 developed into a war of freedom until 1849. After its defeat, the Austrian government opened up after the division of the historical Hungarian state body and privileges, taking a path towards controlled modernisation. However, they could not prevent the self-determination of the national movements⁶². The *Organisationsentwurf für die Gymnasien und Realschulen* of 1848/1849 initiated a reorganisation of the secondary school system on this basis, which had a lasting effect in all parts of the Monarchy. As a result of these educational reforms, the eight-class gymnasium, the subject teacher system with teacher examinations and the baccalaureate were also introduced in Hungary⁶³. Further changes began in 1849, when university reforms based on Humboldt's Prussian university model were implemented in all regions of the Habsburg Empire, including the University of Budapest. The Compromise of 1867 and the union with Transylvania gave Hungary a special status as the only nation-state within the Habsburg Monarchy that was virtually

⁵⁹ Bahlcke, *Osmittleuropa*, cit., pp. 62-64.

⁶⁰ A. Gergely (ed.), *Magyarország története a 19. században*, Budapest, Osiris Kiadó, 2003, pp. 206-207.

⁶¹ Puttkamer *Schulalltag*, cit., p. 71.

⁶² In detail, Gergely, *Magyarország története*, cit., pp. 280-285.

⁶³ Puttkamer, *Schulalltag*, cit., p. 72.

independent, where the government of Kálmán Tisza, led by the Liberal Party, brought about a long period of political stability⁶⁴.

4.1. *The Hungarian Nation-State Ideology and Herbartianism*

According to Puttkamer, the special feature of the Hungarian nation-state ideology was that the Hungarians themselves, as the people of the state, represented only a minority for a long time (in 1880 only 45%). This is why the Hungarian state retained its multinational character after the Compromise. Hungarian nationalism, as in the whole of Europe, can be understood as a future-oriented political concept of order in which the nation represented the highest moral value and the natural basis of state and social organisation, and in addition expected loyalty from its members. The Hungarian national idea is therefore particularly linked to belonging to a language community and to a fatherland, a legal association extended to the entire population. In addition to identification with the nation and commitment to the nation, the idea of national renewal, in which every individual was called upon to participate, emerged in this epoch. Modern nationalism in Hungary had a strong force of mobility, in which the mother-tongue school system and the patriotism of the teaching staff had been a strong force of mobility⁶⁵.

On the one hand, this education system and education policy was in the service of an increasingly homogeneous nation-state ideal. Thanks to the liberal government, the Compromise of 1867 paved the way for a modern dual school system with Hungarian as the language of instruction. In 1868, the government also passed a new elementary school law (GA 38/1868), which established compulsory schooling for six- to twelve-year-old children⁶⁶. The Hungarian secondary school system was already profoundly reformed by the organisational draft in 1849. The autonomy of the traditional church school boards was restricted when the curricula, Matura examinations and school supervision were standardised and placed under state control⁶⁷.

From this time onwards, Hungarian universities were also subject to these ideas. Until 1872, Hungary had only one university, in Pest (since 1872 united with Buda to become Budapest), in which the University of Vienna had a strong influence with the founding of the independent Lehrkanzler of Education

⁶⁴ A. Wandruszka, P. Urbanitsch, *Die Habsburgmonarchie 1948-1918*, Wien, ÖAW, 1980; Németh, *Die ungarische Bildungsreformen*, cit., pp. 110-112; R. Göllner, Zs. Lengyel, J. Puttkamer, *Ungarn*, in H. Roth (ed.), *Studienbuch Östliches Europa*, Köln, Böhlau, 2009, Vol. I, p. 423; Helmedak, Roth, *Das Habsburgreich*, cit., pp. 201-202.

⁶⁵ Puttkamer, *Schulalltag*, cit., p. 29.

⁶⁶ *Ibid.*, p. 73.

⁶⁷ *Ibid.*, p. 171.

(*paedagogia sublimior*) in 1814, at which a professor only held office for a few years, then was not reappointed until 1870⁶⁸. It was only in this year that a change towards the laicisation and scientification of pedagogy began, when the first full professor Ágost Lubrich (1825-1900) was appointed. He headed the teaching chancellorate until 1900, but in his pedagogy he continued the Catholic orientation that had prevailed since the foundation. His three-volume work *Neveléstudomány* (Educational Science), published in 1868, was the first systematic and theoretical work that expanded Milde's traditional Catholic pedagogy⁶⁹. The reform period after the Compromise required new pedagogy to meet the expectations of the new educational ideology. However, instead of Catholic and Protestant theologians, the state-governed education system had to be supplemented by new specialists with modern expertise who were loyal to the respective government⁷⁰.

For the pedagogical foundation of the national-liberal educational policy, Herbartianism also seemed to be at its best in Hungary at this time. One of the most important protagonists who could fulfil the new expectations was the ambitious «Gymnasial» teacher Mór Kármán (1843-1915), who in 1869 was sent by the Minister of Education to the Ziller Pedagogical Seminar in Leipzig for two years of training in Herbartianism. In Leipzig Kármán made the acquaintance of Wilhelm Rein, which later developed into a lifelong friendship and scientific collaboration. In 1872, after his habilitation, he was granted the authorisation to teach as a «Privatdozent» in pedagogy, psychology and ethics⁷¹.

At this time, he was already a well-known theorist with a broad knowledge of Hungarian education. However, this promising career was not entirely unhindered. This was partly due to a sharp professional debate and rivalry with Ágost Lubrich and partly due to ideological opposition arising from the strong Catholic conservatism at the University of Pest. As an opponent of Herbart, Lubrich strongly criticised the German scholar's pedagogy and the teacher training based on it from the point of view of contemporary Catholic views. He saw the greatest fault in the fact that although Herbart accepted the necessity of religion, the essential feature was God-free idealism. According to him, because of the shortcomings of the theoretical concept, the curricula based on it were also useless⁷².

⁶⁸ Brezinka, *Pädagogik in Österreich*, cit., p. 60.

⁶⁹ *Ibid.*, p. 107; A. Németh, *Die Entwicklung der Pädagogik zur Universitätsdisziplin, sowie ihre Institutionalisierung an der Universität in Budapest*, in K.P. Horn et alii (edd.), *Erziehungswissenschaft in Mitteleuropa*, Budapest, Osiris Kiadó, 2001, pp. 309-315.

⁷⁰ Németh, *Die Herbartianismus*, cit., pp. 101-102.

⁷¹ Brezinka, *Pädagogik in Österreich*, cit., pp. 107-108.

⁷² More on this debate can be seen in detail in Németh, *Die Herbartianismus*, cit., pp. 102-103; *Id.*, *Die Entwicklung*, cit., pp. 330-332; *Id.*, *Der Einfluß des Herbartianismus*, cit., pp. 58-59; *Id.*, *Herbartianische Einflüsse*, cit., pp. 240-241.

As a result, as we have seen in the debate between Vogt and Dittes in Vienna⁷³, there was a sharp confrontation between the university professor and the practical trainer of «Gymnasial» teachers. The result was an institution run by Kármán, which was organisationally separate from the university. Herbartian-influenced practical teacher training was therefore realised primarily in this Pedagogical Institute, which was founded on the model of Ziller's seminary. In the pedagogical department of the institute, teacher candidates could study from 1872 onwards a specific subject, «gymnasialis paedagogia», taught by Kármán. The grammar school, founded in 1872, was also influenced by the pedagogical approaches of the Ziller Training School, later modelled on the Jena Pedagogical Seminar under Rein⁷⁴.

Kármán was a member and secretary of the National Education Council (1873-1883), and as editor of the journal *Magyar Tanügy* he played a leading role in the development of Hungarian education⁷⁵. He also wrote the curriculum (1878) and the methodological instructions (1880) for grammar schools. The curriculum was designed according to the expectations of the educational policy based on the national-liberal ideology. The concept replaced religious instruction with secular ethics and moral education. With a central focus given to the Greek and Latin classics, national literature and history, a detailed presentation of the natural conditions of the homeland, and an emphasis on the inseparable unity of the national and the European culture, the curriculum was as a Hungarian version of the Neo-Humanist educational ideal unformed by Herbartianism, in which an anticising classicist cult of harmony, a corresponding morality and an artistic style avoiding all kinds of dissonance were propagated⁷⁶.

4.2. *Criticism of Herbartianism and Schleiermacher's Reception*

In 1870 at the University of Budapest and soon also at the University of Kolozsvár, which was founded in 1872, a chair for pedagogy and «professors' training institutes» with practice schools for the training of secondary school teachers were introduced. These institutions were also modelled on German Herbartianism⁷⁷. Although the institutional framework of teacher training

⁷³ Adam, *Die Pädagogik des Herbartianismus*, cit., pp. 14-15.

⁷⁴ This debate can be seen in further detail in Németh, *Die Herbartianismus*, cit., pp. 102-103; Id., *Die Entwicklung*, cit., pp. 330-33; Id., *Der Einfluß des Herbartianismus*, cit., pp. 58-59; Id., *Herbartianische Einflüsse*, cit., pp. 240-241.

⁷⁵ Berzinka, *Pädagogik in Österreich*, cit., p. 108.

⁷⁶ Németh, *Der Einfluß*, cit., pp. 236-238; Id., *Herbartianische Einflüsse*, cit., pp. 240-241; Id., *Die Rolle des Herbartianismus in der Gründung der ungarischen Pädagogik und Gymnasiallehrerbildung*, in R. Bolle, W. Halbeis (edd.), *Wie lernt man Erziehen? Zur Didaktik der Pädagogik*, Jena, edition Paideia, 2006, pp. 162-165.

⁷⁷ *Ibid.*

at secondary schools was also introduced in the spirit of Herbartianism at the University of Kolozsvár, the strong Protestant tradition in Transylvania remained dominant. Thus, from this time onwards, a new colour appeared on the palette of Hungarian educational thought (which was strongly influenced by Herbartianism) in the form of the criticism of Herbart by the professors in Kolozsvár, who fed their theories from a different educational paradigm. In 1872 Lajos Felméri (1840-1894) was invited to head the teaching board of pedagogy. His main work, *A neveléstudomány kézikönyve*, (Handbook of Educational Science) was published in 1890⁷⁸. The work evaluates and discusses current issues in theoretical and practical pedagogy. In the book, Felméri refers to a number of English and French authors. Characteristically, there are many psychologists among the English and French authors cited⁷⁹. His sources also include some German philosophers, psychologists and educationalists such as Immanuel Kant, Johann Gottlieb Fichte, Friedrich Paulsen, Wilhelm Wundt, and Johann Heinrich Pestalozzi⁸⁰. It is very strange that Herbartian pedagogy was almost completely disregarded in Felméri's pedagogical manual. When one sees his distance from Herbartian pedagogy and his receptivity to the works of Anglo-Saxon authors, one might think that he was following a utilitarian, pragmatist pedagogy, like the handbook of the contemporary Alexander Bain: *Education as a Science* (1879)⁸¹. However, while Bain put the "exact" sciences first in pedagogy and only deals with the reduced role of the Greco-Latin rooted *studia humanitatis*, Felméri clearly advocates the *humaniora*.

After Felméri's passing the Lutheran theologian István Schneller (1847-1939) was appointed professor of pedagogy and theology in 1894. Schneller came from a Lutheran pastoralist family which had made it a tradition to study at German universities. Thus, he too was strongly influenced by German philosophy, theology and pedagogy. His intellectual development in his youth was strongly determined by the orientalist philologist and philosopher Max Müller (1823-1900) and the Jena theologian Otto Pfleiderer (1839-1908). During the time of his studies at the University of Jena, he became acquainted with the teachings of the German "romantic theologian" Friedrich Daniel Ernst Schleiermacher, who had previously worked there. This significant influence prompted Schneller to be his successor⁸².

Schleiermacher's philosophy, theology and pedagogy are also characterised by the claim of independent theorising, as described by several analysts of his oeuvre. The pursuit of autonomy also manifests itself in the fact that he did not even take notice of Herbart⁸³. In Schleiermacher's view, education always

⁷⁸ L. Felméri, *A neveléstudomány kézikönyve*, Budapest, Eggenberger, 1890.

⁷⁹ *Ibid.*, pp. 665-671.

⁸⁰ *Ibid.*, p. 451.

⁸¹ A. Bain, *Education as a Science*, London, Kegan, 1879.

⁸² See about this in detail, B. Pukánszky, *Schneller István*, Budapest, OPKM, 1990.

⁸³ E. Fináczy, *Neveléstudomány a XIX. Században*, Budapest, MTA, 1934, p. 50.

takes place in a particular social sphere and shapes the child for that social sphere. It distinguishes between different social communities, namely the state, the church, free social contact (private sphere) and finally the national community of knowledge and language⁸⁴. Here his influence on István Schneller is particularly well demonstrated, who similarly links the ethical development of the individual with the acquisition of the values conveyed by the intertwined community circles.

His relationship as Schleiermacher's successor to Herbart's pedagogy and Herbartianism was particularly revealing. The egocentric, joyful instinctual being described by Schneller corresponds to Herbart's description of the moral carelessness, lack of ethical barriers and licentiousness of the child born into this world⁸⁵. Finally, in Schneller's stage of the development of the "level of pure eternity", man values everything in relation to the great whole. The ethical measure of individual action here is voluntary activity for the community and the inherent value of the individual. Herbart does not rise to such heights. His worldview is pragmatic, and his ethics are also a kind of «moral idealism without God»⁸⁶, a way of «God-free idealism». However, his pedagogy was a "bull's eye" in its time with a "Sitz im Leben" (seat in life) because it fit perfectly with the zeitgeist, including the petty-bourgeois mentality of the time. Despite these differences, Herbart's pedagogy was examined in several of Schneller's works⁸⁷. In his later works, he adopted the apparatus of the German pedagogue's system of categories, already in Herbart's train of thought, so that in the course of his thorough critique of Herbart, he finally expressed his own moral-pedagogical conception.

4.3. *Herbartianism as an Accepted University Discipline*

Towards the end of the 19th century, a generation of scholars grew up in Hungary consisting of students of Mór Kármán. In the background was a long-standing collaboration between Kármán and Rein, in which several of Kármán's students were given the opportunity to study with Rein in Jena on scholarship⁸⁸. They played a significant role in ensuring that Herbartianism developed into a recognised university discipline after the turn of the century. The pedagogical teaching chancellorship at Budapest University was held from 1900 to 1930 by

⁸⁴ *Ibid.*, p. 29.

⁸⁵ O. Willmann, T. Fritzsche, *Johann Friedrich Herbart's pädagogische Schriften*, 2 vols., Osterwieck-Leipzig, Zickfeldt, 1913, Vol. I, p. 248.

⁸⁶ See also the rhetoric of the Lubrich and Kármán debate.

⁸⁷ Á. Schneller, *Alkalmi megjegyzések Herbart lélektanának alaptételeire*, Budapest, Athenaeum, 1899; Id., *Paedagogiai dolgozatok*, Budapest, Hornyánszky, 1900, Vol. I.

⁸⁸ Németh, *Der Einfluß*, cit., p. 238; Id., *Die Rolle*, cit., pp. 152-155.

the respectful pedagogue, Ernő Finácz (1860-1935), the Hungarian protagonist of Catholic Herbartianism, who was also represented by Willmann. If his role can be judged, it can be said that he sought a middle way, with the help of which a contemporary Christian pedagogy with a sound scientific knowledge can be promoted. The basis of his scientific life's work is represented by his works on educational science, which create the historical-deductive foundation of his Catholic-oriented normative pedagogy, the most important results of which can be found in a work on the history of pedagogy consisting of five volumes. His outstanding theoretical pedagogical and educational scientific works, which are systematically structured, reflect a principled consistency, and make use of the results of international literature with a pronounced sense of style, represent lasting values in Hungarian educational science⁸⁹.

At the turn of the century, with the expansion of the elementary school system, the number of teachers working in various low-level institutions also grew; following these initiatives, a new pedagogical direction in children's studies began, which experienced its heyday after the turn of the century. The teacher of the State Teacher Training College in Budapest, László Nagy (1857-1931) and his colleagues founded the Hungarian Society for Child Research in 1906. The centre of cooperation in child research and then in reform pedagogy at this time was the Pedagogical Seminar, which was founded in 1912 under the direction of Ödön Weszely (1867-1935) for the further education of teachers in the capital⁹⁰. His curriculum vitae and life's work signify a direction established outside the universities. He started his pedagogical activity in a primary school, and following his university studies he became a secondary school and then a grammar schoolteacher. During these years he became acquainted with Herbartian pedagogy through Kármán, and in 1895 he took part in the Jena Summer Course and became one of Rein's most consistent followers in Hungary⁹¹. Until 1918 he played a leading role in the educational reforms of the Hungarian capital. In 1914, after his habilitation, he became a «Privatdozent» at the University of Budapest. From the early 1920s, Weszely taught at the University of Pressburg, then in Pécs as a professor of education. In his theoretical and school pedagogical works, a system was established in which not only the traditional elements of Herbartianism, but also the results of child research and reform pedagogy found a place. His works from the 1920s onwards represented a unique transition to the pedagogical «Geisteswissenschaften» of the 1930s⁹².

⁸⁹ In detail Németh, *Der Herbartianismus*, cit., pp. 105-109; Id., *Die Entwicklung der Pädagogik*, cit., pp. 337-345; Id., *Der Einfluß des Herbartianismus*, cit., pp. 58-62.

⁹⁰ A. Németh, *Weszely Ödön*, Budapest, OPKM, 1990, pp. 13-14.

⁹¹ Id., *Der Einfluß des Herbartianismus*, cit., p. 241.

⁹² See their activities in detail in Németh, *Der Einfluß des Herbartianismus*, cit., pp. 58-62; Id., *Der Herbartianismus*, cit., pp. 105-109; Id., *Die Entwicklung der Pädagogik*, cit., pp. 337-345.

Conclusion

With the present article we have attempted to demonstrate the general, common features of the German reception of Herbartianism by reviewing the approach's success in Central and Eastern Europe in the 19th century on the basis of a relatively large body of previous literature on the subject. This review strengthened and clearly established the thesis that Herbartianism in the 19th century as an official state pedagogy also played an important role in East Central Europe, both in the different regions as well as in the successor countries of the imperial and royal monarchy. With the spread of the pedagogical theories of German Herbartianism in the different regions, it acquired a dominant position in the shaping and development of educational policy, in the construction of different school systems and in teacher training. His views have also determined the organisational framework of teaching, curricula, school subjects and textbooks.

The example of Hungary as a case study shows that Herbartianism also played a decisive role in the foundation of Hungarian nation-state educational reform in the second half of the 19th century, as well as in the beginning of the 20th century. Its Hungarian protagonists had expanded their activities not only in its spirit, but also in close contact with the German scholars representing the direction. Although a central role can be attributed to the Protestant-influenced Herbartianism for the establishment of pedagogy as a science as well as the professionalisation of the teaching profession up until the turn of the century, a basic Catholic trait is unmistakable. This can also be seen in the fact that the transconfessional orientation of Herbartianism did not find such broad acceptance either among the Hungarian conservative Catholic elite or among Protestants as it did in other parts of the monarchy⁹³.

It can also be seen that Herbartianism laid the foundation for the educational ideologies in the successor states of the region, as well as for their pedagogical features, which developed during their implementation. As a result, there are a number of universally valid elements that educational researchers in later successor states have presented from the perspective of their own country's specific narratives and heroes. One direction for future research could be the development of a joint research collaboration that goes beyond the presentation of local self-legitimizing heroes and events that underpin the nation-state identity of each country, and examines these interconnected regional educational historical processes embedded in the broader historical processes of the East Central European region.

⁹³ Id., *Herbartianische Einflüsse*, cit., p. 242.

New school and education of new man in Zlín and Borovo. An example of a difficult pedagogical transfer*

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ABSTRACT: The interwar period was marked in the European educational debate with the search for the “new school” and the “new man”, often constructed as a medium and member of the “new society” in the context of the so-called life reform. The discussion was characterized, among other things, by international cooperation and therefore also by an intensive cultural transfer of ideas and reform patterns between regions or countries. An exceptional case study of the transnational pedagogical model of the formation of a «new industrial human being» presents the concept of rationalization exported from the socio-economic field to the educational field. This was also the case in the educational debate in company town Zlín, in the “city imperium” of the Czechoslovak shoe manufacturer Tomáš Baťa (1876-1932). The article analyses the transfer options of school reform concepts and educational reform of the new industrial man from the company town Zlín (Czechoslovakia) to the so-called company satellite town Borovo (Yugoslavia).

EET/TEE KEYWORDS: Transfer; Transnational pedagogical model; Education of industrial man; Czechoslovakia; Yugoslavia; XIXth-XXth Centuries.

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Introduction

The shoe producer Tomáš Baťa (1876-1932)¹, not only won the Czechoslovak domestic market in the 1930s, but also became one of the most important “global players” in the shoe industry. In the interwar period, when the national domestic markets were regulated and controlled by the governments of national states with customs duties, the expansion of the Bata company made it necessary to move the shoe production from the headquarters of the parent company to the countries in order to dominate the domestic market here. As a result, the model of rationalised, mechanised shoe production was “introduced” from the company headquarters in Zlín (Czechoslovakia) to the new “production satellite” abroad. However, it was not only the rationalized working methods that were exported from Zlín, but also specific ethics, lifestyles and «life culture» – i.e. also educational programs and training models. The topic of this article presents the conditions under which the transfer (Zlín – satellite city) in the field of youth education and youth training took place, using the example of Zlín and Borovo². We ask whether Borovo has become another «little Zlín» in terms of education or, if not (which we assume it will be), why not. We ask what influenced the cross-border transfer of cultural rules and principles in the field of education between Zlín and Borovo and what should be transferred in the field of public education and in the field of corporate education in Zlín and in Borovo (or Czechoslovakia and the Kingdom of Yugoslavia). We prove that

¹ The basis of the successful company Baťa was a shoe workshop founded in Zlín (then in a village in Moravia) in 1894 by siblings Baťa. During the First World War, thanks to army orders, the company became one of the main players on the shoe labour market in the Habsburg monarchy and continued to enable strong company growth. During the first half of the 20th century, the founder of the company, Tomáš Baťa, rationalized the production process (division of work, division of production, training of workers) and emphasized the competitive aspect. This management leadership was successful even in times of economic crisis. Zlín also became a modern, architecturally and urbanistically rapidly changing city, where the number of inhabitants grew rapidly. In the 30th years of the 20th century the company experienced a new wave of modernization when the satellite towns of company Baťa were established abroad (Europe, Africa, Asia, South America). After the tragic airplane accident of Tomáš Baťa in 1932, when he died (he was supposed to open his satellite branch in Möhlin, Switzerland), the management of the company was taken over by his brother Jan Antonín Baťa and partly also by his son Tomáš Baťa. The new political and economic situation in Czechoslovakia after the Second World War marked a milestone in the history of the company. The company was taken over by the state, also the satellites in Eastern and Central Europe. For this see O. Ševeček, *Zrození Baťovy průmyslové metropole: továrna, městský prostor a společnost ve Zlíně v letech 1900-1938* [The birth of Bata's industrial metropolis: factory, urban space and the Zlín society in 1900-1938], České Budějovice, Veduta, 2009 and M. Jemeka, O. Ševeček, *Tovární města Baťova koncernu: evropská kapitola globální expanze* [Company towns from the Bata Group: a European chapter of global expansion], Praha, Academia, 2016.

² On the topic of establishment and development of company town Borovo see the following part of the text.

the pedagogical transfer between Zlín and Borovo was much dependent on deeper political and cultural differences.

1. *Transfer of educational ideas*

The transfer of educational ideas takes place at local, national and transnational level. The transfer of educational ideas, programs, actions, goals, methods, perspectives, etc. is a highly complex process with reciprocal changes, meanings shifts and reinterpretations³. The changes and new interpretations as well as new identification structures and rules do not follow causal principles. The imported is not an imprint of the exported. It does not appear as a result in a planned, controlled «cause-and-effect chain», but is always read, evaluated, understood and “introduced” in specific situations in a new and specific way. Thus, there is a growing tendency to hybridize, enculturate and adapt educational processes, identity practices or educational policy reform models. Transfer of educational ideas does not in any way mean a “new start” of educational practices. Rather, it means the reformation of existing elements, a reinterpretation of existing ideas or processes⁴.

The transfer “causes” historical “new situations” in the sense of changes. Kaelbe⁵ distinguishes between comparison and transfer, whereby transfer should always be a change in time. In transfer, adjustments of values, norms, ways of thinking are studied in the process of migration from a society of origins to a society of arrival. The transfer should also provide an explanation for similarities and differences. Many differences can be explained either by transfer, i.e. by changes in norms and values, or as a counter-reaction to transfers.

On the other hand, the design of the transfer/comparison to the method and the thought movement of relation and relativization implied by this corresponds to the development and formalization of a characteristic problem view⁶. According to Schriewer, it is important in transfer research not to focus on the subject areas of social (including educational) reality in isolation, not in relation less directness, but always to read them in their historical contextualization/dependence on broader social and cultural contextual factors. According to

³ M. Caruso, T. Koinzer, Ch. Mayer, K. Priem (edd.), *Zirkulation und Transformation*, Köln, Weimar, Wien, Böhlau Verlag, 2014, p. 7.

⁴ *Ibid.*, p. 8.

⁵ H. Kaelbe, *Die interdisziplinären Debatten über Vergleich und Transfer*, in H. Kaelbe, J. Schriewer (edd.), *Vergleich und Transfer*, Frankfurt, New York, Campus Verlag, 2003, pp. 469-494.

⁶ J. Schriewer, *Problemdimensionen sozialwissenschaftlicher Komparatistik*, in Kaelbe, Schriewer (edd.), *Vergleich und Transfer*, cit., p. 25.

Schriewer, transfer research therefore means interpretation and explanation through perspectivation and contextualization⁷.

In this perspective, one should also consider the educational transfer between both cities and the «educational cultures» of Zlín-Borovo. Although the town of Borovo and social life there was created according to the «Zlín model»; although the “founders” of Borovo gained their experience in Zlín, a specific educational entity can be found in Borovo. Their everyday life and their “life logic” were inspired by Zlín, but the principles of educational life in Borovo are not in any way a copy of Zlín, but can be read as a jumble of innovation and tradition. We assume that Borovo is not a new Zlín, but an interesting Yugoslavian example of the education of the industrial man in “company town”.

2. *The Concept of Modernity and Rationalization (“Scientific Management”) between Zlín and Borovo*

2.1. *Zlín – a «social laboratory» of modernity*

Interwar Czechoslovakia intensively sought a model of social reform that would address the burning social issues associated with the modernization of production and the effects of rapid urbanization and precipitous modernization on the one hand. On the other hand, one did not want to succumb to the totalitarian models of a “new society” or the culturally pessimistic voices critical of civilization that demanded a “new man”. Of course, in the Czech debate, proposals for the reform of humanity did not avoid simplistic, undemocratic ideas, but overall there was a loud appeal during that debate for rational reflection on different models for reforming society⁸.

Tomáš Baťa and his concept for a factory town, however, is an example of reformers “falling” for the concepts of progress and rationalization («scientific management»), having confidence in notions of technological progress and the planned management of society that led to a certain loss of individual freedoms. Baťa’s corporate effort is to be understood not “only” as a way to make a profit (although that was the case as well), but also as a specific effort to create his own socioeconomic model of community based on ideas of progress, belief in the power of technology, and the idea that it is possible to solve social questions

⁷ *Ibid.*, p. 26.

⁸ See O. Ševeček, *Zrození Baťovy průmyslové metropole: továrna, městský prostor a společnost ve Zlíně v letech 1900-1938* [The birth of Bata’s industrial metropolis: factory, urban space and the Zlín society in 1900-1938], České Budějovice, Vedita, 2009.

and many problems of the modernization of society through progress and technology.

The ethics of Baťa's model for production and the reform of society («Batism», i.e., the Baťa management system) correspond to the values of «first» or classical modernity as defined by Ulrich Beck⁹: confidence in progress based on the results of science, an emphasis on performance, an order based in rationality (in production as well as in one's daily conduct and social contact), discipline in one's inner thinking and conduct that is controlled¹⁰. Baťa's ethical-social model of conduct and behavior in daily life was a fixed principle and «The ideology of the company and the basis of Baťa's thinking, his perception of man and the world, were not to be questioned»¹¹ so that the successful realization of the «new man in Zlín» could be «guaranteed».

We can view Zlín and Borovo as cities striving to produce the «new man» through the ideas of rationalization and technization of life (in mind, spirit and body). Like his production methods, Baťa's social model was also exported. Nevertheless, it is not possible to see Borovo as a mini-Zlín; the schools in Zlín and Borovo (both public and company ones) developed under different social and political circumstances. However, both cities can be considered «social laboratories» of modernity where the boundaries between public life and one's personal, private life were blurred. (Tomáš Baťa became Mayor of Zlín in 1923; similarly, the leading Baťa figure in Borovo, Tomo Maksimović, became Mayor of Borovo in 1933). This control of both personal and public space took place «anonymous/ covert» and was ensured by the enforcement of a certain model of values and rules in everyday life. As stated by Marek and Strobach¹², the Baťa Company in Zlín organized and thus controlled the its employees' free time: sports organizations were under the administration and control of the Baťa Company, while its exhibition halls, concert halls and educational institutions determined the content of what would be made known and studied, and when. The promotional and press department took care both of the management of social life and the appropriate media «image» of the world (a major role was played by corporate radio, film and newspapers). Young people were brought up within the boarding school system of education, under the supervision of educators and teachers in the company school (Baťa's School of Work). Zlín was looking for loyal young employees to whom it offered a joyful, optimistic «new world»¹³. In Zlín, young people found the opportunity to achieve rapid

⁹ U. Beck, *Modernisierung der Moderne*, Frankfurt am Main, Suhrkamp, 2001.

¹⁰ J. Keller, *Teorie modernizace* [Theory of modernization], Praha, Slon, 2007.

¹¹ T. Kasper, D. Kasperová, *The Baťa Company in Zlín: a shoe company or a school company?*, «History of Education & Children's Literature», vol. 47, n. 3, 2018, pp. 321-348, p. 332.

¹² M. Marek, V. Strobach, *Náš cíl – člověk, lidé, rodiny* [Our goal – man, people, families], «Dějiny a současnost», n. 10, 2011, pp. 14-17.

¹³ H. Moravčíková, *Die Architektur des Bata-Konzerns als Faktor der Modernisierung*, in W. Nerdinger, L. Horňáková, R. Sedláková (edd.), *Zlín: Modellstadt der Moderne*, München,

economic independence from their families, employment, social security, and a significant rise in their social status¹⁴. All this strengthened the “export” of beliefs and lifestyle in line with Baťa’s and Zlín’s ideals.

According to Mareš, however, this standardization and rationalization (streamlining) did not manifest “only” in social aspects (economic and cultural-social), but also took on material form¹⁵. In particular, architecture became an external “proof” of modernization and streamlining in the concept of a «garden city». Mareš explains that almost everything in Zlín was unified – factory buildings, single-family houses for company employees, shops, school buildings, hospitals¹⁶. This unification of the urban space was also aimed at unifying the lifestyle of the inhabitants of Zlín. The feeling of a common identity and emphasis on the rational basis of one’s conduct were strengthened, and this was extended from production to the sphere of private life, which facilitated social control.

The concept of the industrial city and the architecture of the urban space was, like the system of social life and social control, «exported» to the newly emerging satellites, Borovo included. Borovo was designed and built «from scratch» by architects from Zlín.

2.2. Borovo – company town for the «new industrial man»

About 10 years after the Zlín-based Baťa Concern opened its shops in the Yugoslav market, it founded a sister company in Borovo near Vukovar. Plans for building a factory in the Kingdom of Yugoslavia, where Baťa’s stores had been operating successfully since the beginning of the 1920s, were fast-tracked by a 1931 Yugoslav Government decision to increase protective tariffs on footwear imports. Under those conditions it was difficult for Baťa’s products to compete against domestic production, which was why that same year shoe

München, TU, 2009, p. 151.

¹⁴ In the 1930s, the average age of an employee at Baťa in Zlín was 26, and 35% of employees were 20 years of age or younger. *Ibid.*, p. 209.

¹⁵ P. Mareš, *Sonda do kultury města – Zlín, modelové město modernity* [A probe into urban culture - Zlín as a model city of modernity], «Sociologický časopis», vol. 49, n. 5, 2013, pp. 688-689.

¹⁶ Massive new construction of this “new Zlín” began especially after 1924 and followed the aspect of rationalization when it came to the affordability and cost of housing, and largely also took into account the aesthetic, public health and social requirements of housing for the modern man. Baťa was not interested in supporting architectural modernity or the avant-garde, as shown by his departure from the urban development proposals and studies of the city of Zlín prepared by Le Corbusier (who designed a city development plan for Baťa), and his inclination towards the concept of a garden city. To a far greater extent, Baťa made decisions based on the expediency and utility of buildings and their possibilities for meeting the demands of the people living in an ideal industrial city.

manufacturing was launched in Vukovar's port on the Danube River. At the same time, the construction of an industrial and residential complex modeled on Zlín was also started¹⁷. The first issue of the factory newspaper *Borovo*, which was first printed on 15 November 1932, published a scenic photograph captioned: «Zlín used to be a small village, like Borovo today. We will strive to make Borovo what Zlín is now»¹⁸.

The Baťa village in Borovo was designed by Czech architects František Gahura, Vladimír Karfík and Antonín Vítek. It consisted of 13 factory plants and 122 residential blocks, and it had all the necessary infrastructure, an airfield, and cultural, educational and sports facilities¹⁹. The old village of Borovo and the newly built village together became a municipality headed by Tomo Maksimović, the factory's general manager, who was elected Mayor in 1933. In the residential area, 1,818 people lived in purpose-built residences that consisted of either one, two or four apartments²⁰. The residences were located near the factory so workers would not have to walk far and would have more time for rest, as the factory management stated in the *Borovo* newspaper. The paper further described the health-promotion principles applied to the buildings and apartments for the workers: ease of access and a large quantity of vegetation, separate apartments and separate entrances for each family, water supply, electricity, and a bathroom in each apartment, a sufficient number of rooms (at least three bedrooms and a kitchen), and an affordable rent (weekly rent was not allowed to be higher than the average a worker was paid for two hours' work in the factory)²¹.

Under the motto of caring for the workers' wellbeing, there was an encouragement of social and cultural life and the establishment of cultural-educational associations and sports clubs. In return, workers were expected to offer maximum loyalty and efficiency. The cult status of work was maintained through workers' competitions, the results of which were made public. Competition was promoted as a noble deed intended to improve the community and to make it possible for individuals to achieve personal happiness arising from the fact that one has contributed to the said betterment. «On the shore of the Danube River, we are building a happy town of hard-working Yugoslavians»,

¹⁷ K. Hrelja, M. Kaminski, «*Borovo*» *Jugoslavenski kombinat gume i obuće*, [Borovo, Yugoslav industrial conglomerate of rubber and footwear], Slavonski Brod, Historijski institut Slavonije, 1971.

¹⁸ «*Borovo*», vol. 1, n. 1, 1932, p. 3.

¹⁹ I. Žebec, *Utjecaj češkoga kapitala na razvoj Vukovara u razdoblju između dva svjetska rata* [The influence of Czech capital on the development of Vukovar in the period between the two wars], «*Društvena istraživanja*», vol. 17, n. 1-2, 2008, p. 113.

²⁰ K. Hrelja, M. Kaminski, «*Borovo*» *Jugoslavenski kombinat gume i obuće* [Borovo, Yugoslav industrial conglomerate of rubber and footwear], Slavonski Brod, Historijski institut Slavonije, 1971, p. 48.

²¹ «*Borovo*», vol. 2, n. 36, 1933, p. 3.

the factory newspaper pointed out²². The making of a “new man” in a “happy town”, a man loyal not just to his country, but first of all to the company that made it all possible, was promoted as the imperative of the times. Special attention was therefore given to young people, the future workers/co-workers who were meant to become loyal followers of Bat’a’s ideology and examples of the complete transformation of man from traditional farmer to a «Yugoslav industrial worker full of entrepreneurial and creative spirit»²³. On the way to that goal, nothing was supposed to be left to chance, not even free time. One’s “free” time was meant to be spent purposefully, with clear goals and measurable results. Idleness was seen as a source of many problems and social troubles, and the main role of relaxation and entertainment was to restore the energy, clear the spirit and make one fit for new tasks²⁴.

Apart from factory buildings, there were 469 apartments for workers and their families in the Bat’a village in 1938, as well as a range of social and cultural facilities. The Bat’a-Borovo Company employed around 3,500 workers, or co-workers as the employees were called, and it manufactured 200,000 pairs of shoes a week, fulfilling 90% of the total footwear market demand in the Kingdom of Yugoslavia²⁵.

3. *The School Reform Program within the Contexts of Czechoslovakia and Yugoslavia*

The model for the education of an “industrial man” in Zlín and Borovo was fulfilled both by corporate institutions managing boarding schools for educating young employees and by public schools intended for the education of children ages six to 14. The importance, role and formation of the educational institutions of the «new industrial man» must be viewed with regard to «Batism» and the scientific management movement as well as within the context of the discussion about broader school reform in both countries in the interwar period.

After 1918, following the collapse of the Habsburg Monarchy, efforts to reform the schools in both of these newly-formed states – Czechoslovakia and the Kingdom of Yugoslavia²⁶ – became an important political and social issue.

²² «Borovo», vol. 3, n. 30, 1934, p. 3.

²³ «Borovo», vol. 7, n. 1, 1938, p. 11.

²⁴ *Ibid.*, p. 7.

²⁵ I. Žebec, *Utjecaj češkoga kapitala na razvoj Vukovara u razdoblju između dva svjetska rata* [The influence of Czech capital on the development of Vukovar in the period between the two World Wars], «Društvena istraživanja», vol. 17, n. 1-2, 2008, p. 110.

²⁶ After belonging to the centralized, composite, multinational state of the Habsburg Monarchy (called the Austro-Hungarian Empire after 1868) for several centuries, in 1918 Croatia resumed its own restricted sovereignty within a new multinational community of states, the Kingdom of Serbs, Croats and Slovenes (called the Kingdom of Yugoslavia after 1929).

The republican establishment of Czechoslovakia and its emphasis on liberal democratic values on the one hand, and the monarchist establishment in Yugoslavia on the other hand (emphasizing conservative and national values in education to a greater extent) represented relatively different sociopolitical contexts within which the pedagogical discussion on school reform developed. In addition, traditions emphasizing the origins of the modern educational sciences and their related focus on educational goals were relatively different in each country. After 1918, however, in both countries, teachers played an important role in the discussion on school reform and teacher training reform, organizing conventions, continuing education courses, etc. These teachers' activities contrasted in both countries with the relatively low interest of political representatives in adapting the school system to the changed sociopolitical conditions after 1918 and in supporting the education reform with respect to teacher training. Moreover, the adoption of proposals for school reform was "undermined" in both countries in the 1920s by frequent personnel changes to the political representatives in the education ministries, and in Yugoslavia also by a certain political instability bordering on chaos²⁷. That is also why, in the first decade, no major school laws were passed in either country to change the external form of the education system or reform the curriculum and learning process. With regard to school reform, the given situation opened up space for various interest organizations and prominent figures from economic and cultural life, as was the case in both Zlín and Borovo.

In Czechoslovakia, after 1928, the Education Ministry's efforts to reform the schools were supported by the establishment of «laboratory schools» that were to verify the justification of the school reform program promoted by teachers. Its strengths were to take into account the new school curriculum (adopted after 1933) and the new Education Act (which, however, was not adopted until after the disintegration of Czechoslovakia in 1939)²⁸. Yugoslavia adopted a new Education Act in 1929, based on which compulsory school attendance was extended to eight years. The school system of Yugoslavia was, after the adoption of this act, significantly differentiated at the lower secondary level (similarly to the system in Czechoslovakia). Compulsory eight-year education

²⁷ A decade of discussions about proposed bills by no means reflected the thorough preparation of new laws but revealed a chaotic state in the education sector as well as in the entire political life of the country, whose two decades of existence saw 39 different governments and 47 education ministers removed from office (since some of them performed this duty more than once, there were actually "only" 21 individual ministers altogether, but none remained in office for longer than three years). This kind of political dynamic and the continual replacement of education ministers had a negative effect on the processes of reform.

²⁸ Czechoslovakia "inherited" the eight-year compulsory education from the Leopold Hasner Act of 1869 and unified the school system in this direction in Slovakia and Ruthenia as well. This was introduced through the so-called Small Education Act of 1922, which paved the way for the unification of the school system in Czechoslovakia in Bohemia, Moravia and Silesia, Slovakia and Ruthenia. This act also introduced civic education as a compulsory subject.

was introduced for all children, starting with four-year primary schools and continuing with senior people's schools, junior grammar schools, and public or junior vocational schools. Since the state failed to ensure minimal required pedagogical standards or develop a network of schools, eight-year education was not applied in practice.

It is obvious that neither the Yugoslav nor the Czechoslovak systems of education could satisfactorily address the issue of democratic access to education by all pupils throughout the interwar period. Access to educational opportunities and pathways significantly reflected a pupil's social status and the socio-economic status of his or her family. In Czechoslovakia, the situation led to the basic requirement for the establishment of a unified school. In Yugoslavia, there was also demand for pupils' democratic access to education. Nevertheless, the overall development of the Kingdom of Yugoslavia and the lay of the political landscape did not allow for the strengthening of liberal democratic efforts in the fields of education and culture. Complex political relationships and the imposition of the ideology of Unitarianism encroached upon education there as well. 'Cultural Unitarianism as an extension of the Unitarianism of the state' met with open resistance. It was not just educational policy that failed, but the entire cultural policy of the Kingdom of Yugoslavia. «Insufficiently thought through, poorly organized, with no continuity, materially ill-provided and excessively subjected to ideology, it achieved results that could not please anyone»²⁹. The funds the state had assigned to education could not maintain the level reached in 1914, much less ensure further development³⁰.

The Yugoslav Education Act highlighted the issue of the «activity school» (practical activity, learn in work, productive work, hands-on curricular framework) and introduced the compulsory subject of work education. Czechoslovak school reform was also carried out in the spirit of active learning and experiential learning, i.e., effective learning. It should be noted, however, that each of these concepts of active learning was based on different ideas. In the Yugoslav discussion (in which Croatian teachers took part intensively), the concept of manual labor in lessons was developed³¹. This led to an emphasis on manual activity in school instruction and to less of an emphasis on the active solution of various problems by pupils within the school (including intellectual

²⁹ L.J. Dimić, *Kulturna politika u Kraljevini Srba, Hrvata i Slovenaca (mogućnosti i ograničenja)* [Cultural policy in the Kingdom of Serbs, Croats and Slovenes (possibilities and limitations)], Zagreb, Friedrich Neumann Foundation, 2000, p. 324.

³⁰ The Kingdom of Yugoslavia expended 22% of its total budget on the gendarmerie and the military, while expenditure for education and culture amounted to between just three and five per cent. Approximately 90% of the total allocation for education was spent on civil servants' and teachers' salaries, while just 10% was spent on the development of education. See L.J. Dimić *et alii*, *Ministarstvo prosvete i ministri Kraljevine Srba, Hrvata i Slovenaca i Kraljevine Jugoslavije 1918-1941*, Beograd, Pedagoški muzej i Ministarstvo prosvete Srbije, 2001, p. 13.

³¹ Š. Batinič, I. Radeka, *Od reformne do alternativne pedagogije: pokušaji drugačije škole u Hrvatskoj u 20. stoljeću*, «Acta Iadertina», vol. 14, n. 1, 2017, pp. 41-60.

ones). Work education was promoted and supported in that particular direction in Yugoslavia after 1920 within the framework of continuous education courses for teachers and within the framework of school policy. After 1926, when it was decided in the syllabus that manual labor activities were to become a compulsory subject in all primary schools, such training courses became increasingly popular and the Yugoslav Teachers' Association and Education Ministry became gradually involved in organizing them. It soon became obvious that the courses needed to be structured and organized so that they could better serve the purpose of school reform, or its *methodological reorganization*. Teachers from other parts of Yugoslavia at that time participated in the courses alongside those from Croatia. Not only did the training courses play an important role as actually ongoing steps in initiating the reforms, but they also «introduced some confusion for the supporters of working school due to a biased understanding of handiwork, and thus also of the fundamental intentions of the movement»³². There was a risk of easily slipping into a new cliché. Instead of Herbart-Ziller's formal steps, a «handicraft formality»³³ was developed, immune to the warnings that a working school is not the same as handiwork.

The reform school principles of the working school in Yugoslavia were to be verified in the "model reform schools". The first school of that kind was established in Belgrade in 1935, and by 1938 there were 13 such model schools in the Kingdom of Yugoslavia. They were all under the supervision of the Education Ministry of the Kingdom of Yugoslavia and followed the guidelines of the leading "pedagogical instructor" Dragoljub Branković, who emphasized the «preparation of pupils for the social, national and state community» as the main goal³⁴.

Czech teachers also emphasized the «individual and social life» (whether sociopolitical, philosophical, economic or pedagogical). In the pedagogical field, the ideas of rationalization and streamlining were complemented by the ideas of the American progressive movement. In pedagogy, progressivism was represented, among others, by John Dewey (1859-1952). Dewey's ideas, taught at the Teachers College of Columbia University in New York City, had a great impact on Václav Příhoda (1889-1979), associate professor at Charles University in Prague and later the designer of educational reform in Zlín. Upon his return from a study stay in the USA (1922-1925 at the University of Chicago and the Teachers College of Columbia University) Příhoda «advocated openness to American progressivism, ideas of rationalization (scientific management)

³² S. Ljubunčić, *Pedagogija u Hrvata od 1918 do 1938 god* [Croatian pedagogy from 1918 to 1938], in M.R. Majstorović (ed.), *Pedagoška Jugoslavija* [Yugoslavian Pedagogy], Beograd, Jugoslovensko učiteljsko udruženje, 1939, p. 37.

³³ *Ibid.*, p. 37.

³⁴ D. Branković, *Psihološko-pedagoške instrukcije oglednim školama* [Psychological-pedagogical instructions for model schools], Beograd, Izdanje Knjižare Jer. J. Dželebdžića, 1938, p. 6.

in science and especially, in pedagogy. On that basis, he tried to win support from Czech teachers for his educational thinking»³⁵. Příhoda argued³⁶ that educational reform must be based, *inter alia*, on the results of science (empirical research, the study of children), must be guided by such results and must be organizationally in accordance with the principles of scientific management. This, of course, was opposed by many critics in the Czech pedagogical discussion. Příhoda's model of education reform was reproached for taking too little account of the ideals and general goals of education, for being too rationalistic, too committed to the idea of progress and scientific truth in line with the positivist tradition in the Czech educational sciences: «Positivism influenced the very grammar and language in which the representatives of Czech teachers did their thinking»³⁷. Perhaps that is why after 1928 Příhoda managed to win over a considerable number of teachers, and especially Tomáš Baťa, who ran for Mayor of Zlín, to his cause of transforming Zlín's public schools into "laboratory schools" according to Příhoda's Reform Plan. On 1 September 1929 the plan was accepted by the Education Ministry, which permitted the opening of such experimental model schools (in addition to those in Zlín, such schools were also opened in Prague, followed quickly by dozens of other cities, especially those in Bohemia, Moravia and Silesia, and some in Slovakia). In this way, Zlín became one of the centers of interwar school reform according to the "American" model. Not just production processes, but social life, education and the upbringing of children were thereby streamlined in Zlín³⁸.

The "old school" and the dualistic school system based on the 1869 Act, which was considered undemocratic and criticized as such (secondary education consisted of the elementary schools, of the post-primary schools, and of grammar schools intended for just some pupils) were to be replaced by a unified school for pupils ages six to 14. «Grammar schools were seen as a legacy and a symbol of the Monarchy, and in the eyes of educational reformers there was no justification for them in the life of the Republic»³⁹. Similarly, at Baťa's schools, the general humanities were not particularly valued⁴⁰.

³⁵ T. Kasper, D. Kasperová, *Development and Focus of Czech Pädagogik in the Late 19th and Early 20th Centuries*, in B. Kudláčová, A. Rajský (edd.), *Education and „Pädagogik“ Philosophical and Historical reflections (Central, Southern and South-Eastern Europe)*, Berlin, Peter Lang, 2019, pp. 194-209, p. 203.

³⁶ V. Příhoda, *Racionalizace školství* [Rationalization of Education], Praha, Sfinx, 1930.

³⁷ T. Kasper, D. Kasperová, *Exactness and Czech pedagogy at the break of the 19th and 20th Century*, «History of Education & Children's Literature», vol. 12, n. 2, 2017, pp. 343-358, p. 356.

³⁸ T. Kasper, D. Kasperová, M. Pánková (edd.), «Národní» školství za první československé republiky [“National” Education in the First Czechoslovakia], Praha, Academia, 2018, p. 221.

³⁹ T. Kasper, *Die Reform der Mittelschule in den Ersten Tschechoslowakei – Soziale oder pädagogische Frage?*, «Bildung und Erziehung», vol. 70, n. 2, 2017, pp. 183-196, p. 185.

⁴⁰ General secondary schools practically did not exist in Zlín. In particular, vocational secondary education was developed there.

The reformist model of the unified school was meant to consider the individual characteristics and talents of the pupils. Their interests were to be taken into account by the system of individualized educational tasks and differentiation into groups within the school based on their performance as well as into groups focused⁴¹ on certain content of educational subjects. According to the principles of Behaviorism, learning was to be individualized and “tailored to the child”, because each response was found to be individual and appropriate to the specific needs of the individual. At the same time, learning was understood, in the spirit of pragmatism, as a solution to problematic situations closely connected with the child’s life and corresponding to his/her questioning of the world. In the internal organization of the schools, subjects were to be scheduled so that the prescribed number of lessons in a given subject could be taught in one go in a shorter period of time, rather than teaching the subject over a longer period, but having just one lesson at a time (“concentration of the curriculum”). Connections between disciplines and an interdisciplinary curriculum were emphasized. The “slogans” of the reform were experiential learning, learning by doing, the project method and project-based curriculum/learning, as well as so-called school democracy, democratic education enabling pupils to acquire and develop values in the democratic, republican spirit (pupils’ self-government, a school parliament, a school magazine written by pupils, a school radio station with a program prepared by pupils, regular school “meetings”, field trips, visits by public representatives to the school, organization of school celebrations, support and charity work by the school for socially disadvantaged pupils, pen-pal correspondence with pupils from other towns of the Baťa Concern from all over the world, etc.). The school should live a democratic life if it was to lead students toward democratic behavior and thought.

⁴¹ In accordance with Přihoda’s concept, at the experimental municipal schools in Zlín the children were divided into four branches of study – the humanities; industry; business and trade; and a “practical” branch – based on their prerequisites for study as measured by intelligence and psychotechnical tests. The curriculum and methods were different in each branch according to the children’s degree of learning abilities and talents as established by the tests. Inclusion in a branch of study was not permanent and could be changed, which meant the experimental schools were able to allow for greater permeability and variability of the educational path compared to the existing school system. See T. Kasper, *Die wissenschaftliche Neuorientierung der tschechischen Pädagogik im Windschatten ihres amerikanischen Vorbildes – eine Zwischenkriegszeit Fallstudie*, in A. Hoffmann-Ocon, N. Grube, A. de Vincenti (edd.), *1918: Bildungshistorische Blicke auf Traditionen, Transitionen, Visionen*, Bad Heilbrunn, Klinkhardt, 2020, pp. 135-158.

4. *Reformed Public Schools in Zlín and Borovo – An Example of Pedagogical Transfer?*

An experimental public school first opened in Zlín as of 1 September 1929. Initially it was a lower secondary school⁴² developing and verifying the above-mentioned pedagogical principles of the reformist pedagogical program. In 1932 another experimental school was opened in Zlín to verify the same reformist program at the primary level (pupils age six to 11)⁴³.

What was important during the opening of the experimental public school in 1929 were Příhoda's courses and lectures attended by its teachers during the holidays of 1929, as well as the previous study undertaken by the director of the Zlín experimental public school, Stanislav Vrána (1888-1966) at the Teachers College of Columbia University in New York City in the years 1927-1928 under Dewey and other representatives not just of American pragmatism and progressivism, but also of Behaviorism. Vrána was not an unknown figure in the Czech discussion on pedagogical reform – quite the contrary. Since the establishment of Czechoslovakia Vrána had been closely involved with reform-oriented teaching and empirical research in education. Nevertheless, it was crucial for the educational reformers in Zlín that their “leader” had visited American experimental schools and studied the American educational sciences. These concepts were to become authoritative for the pedagogical program and for the path taken by the experimental public schools in Zlín and Borovo, respectively.

⁴² In Zlín, an experimental secondary school opened in 1929 (director Stanislav Vrána); because of great demand, a second such experimental secondary school opened there in 1937/1938 (director Nora Hradilová). Neither school was restored under the changed political conditions after 1945, although requests to do so were made several times at the Ministry of Education and National Enlightenment. See T. Kasper, D. Kasperová, *Nová škola v meziválečném Československu ve Zlíně* [New school in Zlín in interwar Czechoslovakia], Praha, Academia, 2020, pp. 139-142.

⁴³ This was an experimental primary school (director Oldřich Horák) whose reform activities were also not resumed after 1945. The educational reform at the experimental primary school emphasized the activity principle during instruction (a child who acts, examines, asks, draws, models, and conducts experiments). Other pillars of this primary school for its first and second grades included so-called unified school lessons that were not divided into individual subjects, but where the instruction rather represented a single stream of reading, writing, counting, singing, painting, and movement around one central theme (issue) of the day. This concept of instruction (interdisciplinary curriculum) was meant to be closer to the child's own world, as children at that age comprehend and perceive the world around them as a whole (not as a section of separate scientific disciplines). From the third grade on, individual subjects were introduced at this primary school in Zlín. The method of reading and writing (reading whole words, not sounding out their syllables) was closely related to the interdisciplinary curriculum, with new textbooks created for this purpose (copybooks and readers). Excursions (to the countryside, factories, visits to important figures), school academies (pupils' theater, singing, recitation), exhibitions, joint activities with parents and representatives of the community were often undertaken. In part, class self-government was also developed. See Kasper, Kasperová, *Nová škola v meziválečném Československu ve Zlíně*, cit., pp. 136-236.

However, we must be aware of the different conditions prevailing when the experimental public schools opened in Zlín (in 1929) and in Borovo (in 1935). While the Zlín experimental schools were the result of a much broader effort by the reformist pedagogical movement in Czechoslovakia and, among their other tasks, these schools were meant to assess and verify their program for reform of the schools (albeit in the specific situation of Baťa's company town of Zlín, in contrast to other schools), the schools in Borovo were primarily established as part of a concept for living in the industrial town of Borovo. While the school reform program of the Zlín schools had been conceived gradually over a decade as part of Czech teachers' discussions in their associations and with regard to the development of the educational sciences at universities (in Prague and Brno), the school in Borovo did not grow out of a broader reformist stream. In some respects, it stood alone as a specific model of a school linked to the ideals of Borovo as an industrial town. Nevertheless, the school in Borovo became a center of «pedagogical tourism» and was visited by a large number of Yugoslav teachers. Certainly, this school played a significant role in the further discussion of school reform in Yugoslavia.

The conceptual transfer of a reformed school according to the Zlín “model” to Borovo would, however, have required similar conditions in both “cultural” environments to make such a transfer possible. What was similar were the conditions of production both in Zlín and Borovo; the starting points for ideals about the modernization of life in Zlín and Borovo were less similar to each other. Zlín was a community believing in ideals of modernization and rationalization, a community that promoted these ideals, reflected on them, and changed them on the basis of their outputs⁴⁴. Borovo was stylized as an industrial town following that model, i.e., as “imitating” the principles of Zlín's modernity.

At the time the school was founded in Borovo, loyalty to the Zlín model was emphasized in the company's press at the time, which demonstrated the ideals in the life of the “industrial man” in Zlín and how to understand them. Teachers from Borovo visited experimental schools in Zlín both before the opening of their own school and later during their pedagogical work⁴⁵. At the Borovo opening, the Zlín “founders” celebrated the ideals of life in an industrial city

⁴⁴ D. Kasperová, *Výchova průmyslového člověka a firma Baťa v meziválečném Zlíně* [Education of industrial man and the company Baťa in interwar Zlín], Liberec, TUL, 2014.

⁴⁵ A group of teachers organized by the Yugoslav-Czechoslovak League from Zagreb visited Czechoslovakia in 1933 in order to get acquainted with reformist efforts in the area of Czechoslovak education and pedagogy. They also visited the schools in Zlín, where they were welcomed by Stanislav Vrána. The teachers were amazed by what they had seen during the two days filled with «rare emotions and insights» in the town, which was called «a piece of America in Czechoslovakia». More S. Ljubunčić, *Školstvo i prosvjeta u Čehoslovačkoj (s osobitím obzirom na pedagošku i školsku reformu)* [School system and education in Czechoslovakia (with a particular emphasis on pedagogical and school reform)], Zagreb, Naklada A. Brusina naslj. V. & M. Steiner, 1934, p. 9.

and the “activity school”. It was made obvious that Borovo should look up to Zlín if it wanted its inhabitants to achieve the goals of prosperity and a happy life. In their speeches, company representatives from Zlín and their colleagues from Borovo assumed that social communities could be built just like urban units. The transfer of an educational model for “industrial man” presupposed the introduction of certain current principles, work activities and especially the establishment of company schools (see below). Wider sociocultural conditions and traditions among the employees – young men and young women – were not thematized in Borovo. The transfer of the school reform program also envisaged the introduction of certain reform principles, procedures and strategies to the experimental public schools in Borovo in order to achieve the same goals as in Zlín – acquiring certain kinds of knowledge, developing certain skills and social habits, as well as accepting and internalizing values according to the *ethos* and the model of “industrial man”.

Before the new public school building was opened in Borovo, the *Borovo* paper printed a full-page article with photographs about the schools in Zlín. The article was entitled *New School for a New Man* with an astute opening quotation from Tomáš Baťa that probably could have been signed by any reformist representative of pedagogy in the period between the two wars: «We want to educate our children so well that they will not just be our pupils, but also our teachers»⁴⁶. The author of the article then continued, in the manner of a fairy-tale narrator, to relate how a conversation with a teacher had given Baťa the idea to establish schools of an experimental nature where the best educational and teaching methods would be explored just like in his factory, where there was a department dedicated to experiments with leather, polish, models, machinery and footwear and to trying out every novelty in the footwear industry. Big, airy school buildings were thus built in Zlín to accommodate the model civilian school, the model public school and the trade school, equipped with the latest teaching aids and materials. Visual teaching, libraries for parents and children, school trips, festivities, concerts, performances, exhibitions and sports activities constituted an integral part of growing up and schooling, which is why «the children of Zlín are the happiest in the world», as is said to be evident from their appearance: «Full, red cheeks, a well-developed physique, clean and presentable clothes – clear evidence of the well-being enjoyed by the working class of the Zlín area; a lively and happy deportment, the natural, simple, unhindered behavior of the pupils, their bright eyes, their politeness and friendliness to strangers – that is the best proof of our educational success»⁴⁷. The article ends with the statement that Zlín is known not just for

⁴⁶ F. Klačík, *Novom školom – novom čovjeku* [New School for New Man], «Borovo», vol. 3, n. 34, 1934, p. 3.

⁴⁷ *Ibid.*

its manufacture of shoes and for its social institutions, but also for its creation of the “new man”.

The new four-year public school with a playground and a nursery that opened on 4 February 1935 in Borovo became the center of children's lives in the village. Ferdo Klačík, the principal, established the ideal of a «nice, healthy and lovable child»⁴⁸. During its first year the school received 1,500 different visitors – teachers, pupils, students. In the spirit of the reformist pedagogy rhetoric, teachers called it the «school of the future»⁴⁹. Perhaps, in relation to most other schools in the Kingdom of Yugoslavia, the school in Borovo represented a future that was difficult to reach. Its relatively small (even if well-equipped) school building, which had obviously been of a temporary nature, was replaced with a modern edifice with 12 classrooms in 1937. The reformist spirit of the school, cherished from its inception, could be fully expressed in this new space. Ambitious, capable teachers were sought who already knew how to work according to didactic methods and principles that were modern, who were able to do such work and who wanted to do it. Although the school had the status of a state school, it did not depend on the state budget, which allowed for a certain independence in creating and organizing schoolwork. Local Bat'a factory manager Tomo Maksimović was successful in carrying out the organizational and philosophical concept of the factory owner, which involved both the education and the upbringing of the future workers/co-workers of the company as people with an entrepreneurial, innovative spirit, content, responsible members of the working and social community. “Bat'a's school” thus did not lack either material or staff support, while its teachers were in turn expected to display a high work ethic, professional ethics, and maximum engagement that included the thorough conceptualizing and preparation of teaching, consulting and making arrangements with their fellow teachers, and a readiness to devote as much time as was needed to their work.

The main features of such teaching included establishing a connection between school and life, allowing pupils their freedom, learning through experience and involvement, letting pupils work independently. The organization of material into *complexes* (one or more days in duration) was carefully planned and designed. Great care was given to physical and musical education, to developing friendly relationships between teachers and pupils, and to collaboration with parents, who could visit the school even when class was in session. The school's good reputation spread through the professional community. It became a kind of role model school, visited by teachers from all over Yugoslavia. After

⁴⁸ F. Klačík, *Radna zajednica i škola* [Working community and the school], «Borovo», vol. 5, n. 1, 1936, p. 10.

⁴⁹ M.Ž. Pavlović, *Jedna naša škola budućnosti* [One of our schools of the future], «Učitelj», vol. 17, n. 3-4, 1936, pp. 214-216.

a positive report on the school by the model school auditor, the Education Minister gave the school the official status of a model school in 1938⁵⁰.

The model school in Borovo hosted the First Congress of Model School Teachers from 30th May to 1st June 1939. Jan Baťa addressed the congress participants, stressing the importance of quality teachers and learning through work and play, as well as the need for continual progress and improvement of the school⁵¹. The congress ended by adopting a resolution consisting of 35 points that included demands for radical reform of primary schools so as to create conditions for the development of all children's potential and to prepare pupils for life in society as useful members of the community⁵².

5. Company Schools in Zlín and Borovo. Industrial Education Program

In 1925, the T. & A. Baťa Company opened its Vocational Cobbler School in Zlín, which quickly became known as Baťa's School of Work (BSW). It provided education for the company's young staff both in terms of professional skills for work in the Baťa Company and in the development of work habits and of one's own personality for life in the industrial city of Zlín. To achieve this ideal, it was necessary for young men to work in various positions in the workshop (to gain work experience) and at the same time to study in the evening at school (to augment their theoretical education, mainly technically, but also generally in part), to live in a dormitory, and, under the guidance of an educator, to acquire the right social habits, attitudes, values and, last but not least, to become disciplined by eating a healthy diet and getting sufficient physical exercise⁵³. Baťa's School of Work formed the development of young people's personalities by focusing on certain qualities – they were to become independent, purposeful, self-confident, performance-oriented and socially adaptable⁵⁴. Baťa's School of Work represented a community of educators, teachers and young men who were to follow the accepted rules, live together in a dormitory, and dress in uniforms decorated with common badges or symbols.

Life at school and in the dormitory involved a specific order that had to be followed. There were severe sanctions for violating that order, including

⁵⁰ «Prosvetní glasnik», vol. 54, n. 7, 1938, p. 612.

⁵¹ «Borovo», vol. 8, n. 40, 1939, p. 2.

⁵² *Ibid.*, p. 3.

⁵³ However, it must be said that in addition to BSW, the Baťa Company also developed many other forms of company education – short-term and long-term courses for employees, trainings, and professional lectures. In 1935, the Institute for Education was founded – a center of continuing education organizing exhibitions, lectures and professional events, with a rich library and a large number of modern exhibits, especially from technical fields.

⁵⁴ Education of Industrial Man, SOAR Zlín, Baťa papers, Company Schooling II/5, Inv. No. 39.

the possibility of expulsion⁵⁵. Young people were provided with enough opportunities to practice sports (swimming, boxing, running, shooting) in order to become physically healthy and resilient. There was also a rich offering of other leisure activities. The purpose of organizing cultural events (music, singing or theater performances) was to get young men used to performing in public. During sports performances or social events, educators were to take notice of young men who showed leadership skills. These events were also intended to gain public sympathy for boarding school education and the idea of educating young men at the BSW.

Bat'a's School of Work established a separate school for women in 1929 in Zlín. It was conceived so as to account for the future role of women in families. Young women from the BSW were to become not only effective workers for the Bat'a Company, but also understanding wives and successful housewives. In this respect, the school's subjects were complemented accordingly to prepare these young women for their future roles as mothers and housewives⁵⁶. While at the BSW for men a young man would be purposefully educated for a future job in the Bat'a Company (as a breadwinner), a young woman would be allowed to work in the factory only until she married, after which she had to leave that job and fully devote herself to the roles of mother, wife and housewife.

This tried-and-tested strategy for investing in the education of young people who were future factory workers was consistently applied in Borovo as well. Before the company schools were established locally, recruited *pioneers* had been sent to Zlín to attend the «school of life» there, to acquire theoretical and practical knowledge⁵⁷, and to learn «how to work, save and lead a happy life»⁵⁸. This domestic unqualified youth workforce from rural areas, prepared to learn and to readily fulfil factory management requirements, had an advantage in getting employment⁵⁹. In 1936, 252 young people worked there, and 132 of them were sent to Czechoslovakia to specialize and become «proper masters of trade»⁶⁰.

In 1937, a Vocational Continuation School for Trades and Crafts started operating in Borovo, offering qualifications for apprentices and skilled artisans. The school was founded and maintained through the factory's own assets. Attendees stayed in a dormitory located in the factory village and attended classes in the evenings after work. Almost 80% of all employees were between 16 and 30 years of age⁶¹.

⁵⁵ *Ibid.*

⁵⁶ *Ibid.*

⁵⁷ «Borovo», vol. 2, n. 26, 1933, p. 1.

⁵⁸ «Borovo», vol. 2, n. 28, 1933, p. 3.

⁵⁹ I. Žebec, *Utjecaj češkoga kapitala na razvoj Vukovara u razdoblju između dva svjetska rata* [The influence of Czech capital on the development of Vukovar in the period between the two World Wars], «Društvena istraživanja», vol. 17, n. 1-2, 2008, p. 112.

⁶⁰ «Borovo», vol. 5, n. 12, 1936, p. 2.

⁶¹ I. Žebec, *Utjecaj češkoga kapitala na razvoj Vukovara u razdoblju između dva svjetska rata*

The Vocational Continuation School did not fulfil expectations and did not give the students an appropriate formal qualification, so it was replaced in 1940 by a three-year secondary vocational school called Baťa's School of Work. Its task was to educate the leading professional staff of the Baťa Company, and it comprised a School for Trade-Industrial Managers and an All-Male Trade-Industrial School with shoemaker-rubber and machinist departments. The students had to obey certain discipline and behavior rules even outside of school⁶². Their guidelines were communicated to them by the paper entitled *New Man – a journal for young men, young women and graduates of Baťa's School*, published between 1938 and 1940, among other such channels.

Since 1937 the Baťa Company had been organizing various one-week or two-week courses for its sales department employees – courses in becoming a salesperson, chiropodist, decorator, accountant or hosier. Organized, structured spending of free time was encouraged, so there existed numerous cultural-educational societies, and in 1939 the Institute for Vocational Training was founded.

Conclusion

When analyzing the transfer of the socioeconomic and ethical model of life from Zlín to Borovo we must state that any conclusions must be drawn with great caution. We have a limited number of information sources at our disposal which, moreover, were often created for a certain purpose – to support the idea of the success in «building a new Borovo» following the example of Zlín. However, it is clear that the fulfillment of this goal was quite problematic, not straightforward, and the expected changes were not always realized as intended. This applied both to production and education. As regards production, it was not a problem to introduce a rationalized production system and many of the management measures used in Zlín. However, it was not so simple to introduce the Zlín concept of work and the Zlín work ethic in Borovo. The work ethic was very high in Zlín, and work as a variable force did not just shape the everyday life of the inhabitants of the company city, but also their lived values. It was not just work performance and economic results that mattered, but overall confidence in a life based on efforts at work that created value for the community (and, of course, also profit). Planned, scientifically organized work was seen in Zlín as a means for human moral development and the social well-being of the community. This model was intensively developed

[The influence of Czech capital on the development of Vukovar in the period between the two World Wars], «Društvena istraživanja», vol. 17, n. 1-2, 2008, p. 111.

⁶² «Borovo», vol. 9, n. 51, 1940, p. 1.

in the Czech discussion and became the topic of many professional societies and institutions dealing with rationalization and with professional institutes of continuing education. The socioeconomic concept of *laboretism* (labor + ethics) was also successfully developed. This was an ethical direction emphasizing the importance of work for individuals and communities; all of this was undertaken with great confidence in the ideas of technological progress and scientific truth.

In Borovo, such changes in philosophical and social thought did not occur in the same form as they had in Zlín, nor can the «Borovo phenomenon» be connected to a deeper, society-wide debate in this direction, as happened in Czechoslovakia. In education the situation was similar. The reformed schools in Zlín were both a part of and a “result” of a deeper educational discussion on rationalization in education, and they were also just one of several different centers of interwar Czechoslovak school reform. Although the Borovo reformed school played the role of a model school in the discussion on the reform of schools in Yugoslavia, although it was visited by experts, and although the educational process there was discussed, to a certain extent it was just an isolated, unique model of education reform. When teachers from Borovo, as well as other Yugoslav cities, had the opportunity to get directly acquainted with the pillars of school reform in Czechoslovakia and Zlín, during their visits to those institutions they interpreted the reform experiments according to the rules of their own mental pedagogical maps and with regard to the context of the Yugoslav pedagogical discussion on reform. The available archival sources do not allow for a deeper, more accurate reconstruction of the main issues and problems discussed during the visits of Croatian teachers in Zlín. It is, nevertheless, possible to conclude from the available sources that during their joint discussions, the Czech teachers in Zlín did not emphasize to their Croatian colleagues from Borovo that the Zlín school program had to be adjusted, for the purpose of reform, to the Croatian circumstances and its specific features. On the other hand, during those joint discussions, the Zlín teachers did emphasize their complicated, long path to that reform program and the need for permanent reflection and revision of the reform goals according to an ongoing evaluation. The emphasis was, therefore, not on the very pillars of the Zlín school reform (these had been repeatedly described, published in various forms, etc.), but on openness in the reformed pedagogical work and the need for permanent reflection. This seems to be a feature of modernity developing modern forms of social life, and it supported the transfer (from Zlín to Borovo) of an educational model based on concepts of scientific management and, along with it, educational models supporting interdisciplinary curriculum, experiential learning, a project method and project-based curriculum, and, at the same time, so-called school democracy and democratic education. The specific implementation and verification of these models in Borovo cannot be easily reconstructed today given that many information sources were destroyed in the 1990s.

A more direct uptake of the Zlín education model happened in Borovo in the company-provided education and in the institution called Baťa's School of Work. These educational institutions in both Zlín and Borovo set their goals in accordance with the requirements of company practice. Preparing youth to practice skills and work habits could be developed similarly in Zlín and Borovo through this specialized training and schooling. Psychotechnical tests became the support for diagnosing the work skills of the Baťa Company employees in Zlín and in Borovo. Similarly, the development of skills and work habits took place in Zlín and in Borovo through shared resources, methods, and similarly focused training. The working qualities of a young man or young woman could also be determined, developed and legitimized within the closed societal complexes of company schools in Zlín and Borovo more easily and more quickly than was the case with the goals of school reform in the public schools in these company towns. Baťa's School of Work in Borovo was established much later and did not develop as much as did the School of Work in Zlín. In Borovo, short-term courses and staff training prevailed over the institutional, systematic project of Baťa's School of Work. While Zlín became a city of youth, the town of Borovo was much smaller in terms of its population, and the company there did not absorb as many young employees as did the one in Zlín. Moreover, in addition to the education of young people, Baťa's School of Work in Zlín also pursued yet another goal, the education of company managers (including for branches abroad). In Borovo, there was no such goal.

We see the connection between Zlín and Borovo as a space for the transfer of educational concepts and models. The boundaries and limits of this transfer were determined mainly by the relatively different sociopolitical backgrounds of interwar Czechoslovakia and Yugoslavia and by their different experiences in discussing the focus of the educational sciences and the starting points of life reform and school reform in both countries.

Miljenko Vidović, an educational visionary or inventive impostor?

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ABSTRACT: This paper analyses the transfer of educational reform concepts as promoted in the first adult school at Balkan region between the two world wars. Its founder Miljenko Vidović came to Sarajevo from Croatia bringing new ideas how to modernize schools and support ordinary people education. He also founded the journal «Uzgajatelj» (1923-1926) which served for presenting his ideas and ideology dealing with the issues of a general social and cultural development through the ethical movement that he integrated in his educational approach. Vidović's school was not only an educational establishment but also a place for his ideological activities transferring ethical ideas from Europe and USA, as well as the educational reform preferences.

EET/TEE KEYWORDS: Miljenko Vidović; History of school; Adult education; Ethical movement; Reform pedagogy; Yugoslavia; XXth Century.

Introduction

In the period between the two world wars, Bosnia and Herzegovina (BiH) was a poor agrarian country with an immense illiterate population. The elementary and secondary schools founded during the Austrian-Hungarian period mostly remained functioning but the new authority did not promote education. Namely, after the First World War, the region of BiH became a part of the new state under the name The Kingdom of Serbs, Croats and Slovenians (SHS), and after 1929, renamed as the Kingdom of Yugoslavia with Belgrade as its capital. The policy of the new regime was colored by strong centralism and hegemonism. Educational policy had an aim to create a common nationality, the Yugoslav one. The Kingdom of SHS did not follow modern educational mainstreams and was occupied merely with political goals. It was evident that actions and measures that were taken in education had an intensive ideological character. Special attention was given to the efforts of creating a unique educational program

with balanced grammar and terminology, unifying the educational legal basis, making unique schoolbooks for integrated school, etc. The educational task of the primary school was not only to teach how to read and write but «even more to educate nationally»¹. The official political structure of the newly founded state did not take care for the specificity of each community that became its parts. Their previous educational experiences differed immensely, but the regime wanted to move on, following some centralistic ideas of school program unifications without previous inspection of the situation on the ground. «The unification of the school system's organizational structure was proceeded by the unification of syllabi, where undemocratic and unitarist tendencies of the newly established state became evident»². In order to understand better the situation in education in BiH, it is necessary to present some historical changes and events that official policy implemented in everyday life.

Bosnia and Herzegovina after the First World War

After the breakup of the Austrian Hungarian Monarchy and the establishment of the Kingdom of SHS, later on «the first Yugoslavia», the school system stagnated in all regions, and especially in Bosnia and Herzegovina. In this region, the crisis was apparent in economic, social, cultural and educational aspects. The incapability of the state to arrange suitable life conditions affected people's life. The aspiring political option was to create a new national state. Nevertheless, an inconsistency among officially announced standpoints and legal regulation was apparent. The lack of teachers was evident and an enormous number of children was left out of schools. Political decisions did not correlate with the situation on the ground especially in relation to education. The principles of the old school rooted in Herbart's pedagogy prevailed in schools³. According to the Law on education of 1929, basic education became obligatory. Yet, the situation in practice developed differently. The unmanageable educational strategy led to the lack of school infrastructures. Therefore, it was not possible to promote this regulation in practice, mainly in the rural regions. As a result of this policy, children in rural regions were largely left out of school, and this

¹ Lj. Dimid, *Integralno jugoslovenstvo i kultura 1929-1931.godine* [Integral Yugo Slovenian and culture 1929-1931], <340<http://www.cpi.hr/download/links/hr/6978.pdf>> (last access: 30.09.2020), pp. 334-340.

² D. Miljković, Š. Batinić, *Iz povijesti hrvatskoga srednjega školstva u razdoblju od 1918-1940* [From the history of Croatian secondary education in the period 1918-1949], «Napredak», n. 3-4, 2011, p. 520.

³ S. Šušnjara, *Development of school systems and pedagogy in Bosnia and Herzegovina from the period after the World War II to the 1970s*, «Journal of Contemporary Educational Studies», vol. 2, 2015, pp. 78-94.

additionally enlarged the illiteracy, and more over amplified the discrepancy among population, dividing them into poor and rich⁴.

Even though the agriculture worker is the basis of our economic and political life, the agricultural youth has neither systematic education, nor general/vocational education. This ignorant approach and peoples' illiteracy are a tool for corruption, demagoguery and violence in our political life⁵.

The Unitary Yugoslavia reflected its future in making efforts to gain national and cultural assimilation. The priority of the prevailing state policy was to finance bureaucracy and army not education, science, art and culture in general. The percentage of the investment in education and culture was lower than it was average in Europe in that period of time (22 percent of the Kingdom's total budget went to finance the police and military while education and culture got between three and five per cent. Approximately 90 percent of the total amount for education was spent on civil servants' and teachers' salaries, while just 10 percent was spent on the development of education)⁶. The first Yugoslavia was considered as «one of the countries with most illiterate population in Europe»⁷. In accordance to the Census from 1921, the percentage of illiterates in Yugoslavia was 51.25 percent or about 6.2 million people⁸. The 1931 Census showed a slight decrease from the abovementioned percentage, 44.6 percent⁹. The percentage of the illiterates (above 10 years) in 1921, was 48.6 percent¹⁰. The school system in BiH was mostly undeveloped and the village population suffered considerably. As it was already pointed out, the majority of the BiH population lived in villages and was predominantly illiterate. There were 87 percent of illiterate persons above 7 years old from the total population. Elementary school was attended by only one fifth of the children. There were not enough national elementary schools, approximately 320 with 900 teachers. One teacher covered 2,100 inhabitants and there was

⁴ M. Bevanda, *Pedagoška misao u Bosni i Hercegovini, 1918-1945* [Pedagogical thought in Bosnia and Herzegovina], Sarajevo, Filozofski fakultet, 2001, pp. 78-79.

⁵ J. Turić, *Nacrt zakona o školama za preobražavanje naroda* [The scheme of the law in the schools for changing people], «Uzgjatelj», vol. 1, 1924, p. 19.

⁶ L.J. Dimić, *Kulturna politika u Kraljevini Srba, Hrvata i Slovenaca (mogućnosti i ograničenja)* [Cultural policy in the Kingdom of Serbs, Croats and Slovenes (possibilities and limitations)], Zagreb, Friedrich Neumann Foundation, 2000, p. 324.

⁷ B. Krstić, *Borba protiv nepismenosti. Narodno prosvjećivanje* [Struggle against illiteracy. National education], Beograd, Ministarstvo prosvete, 1940, Vol. 3, pp. 33-37.

⁸ A. Kemura, *Kulturne prilike naših muslimana u Bosni i Hercegovini. Narodno prosvjećivanje* [Culture of our muslims in Bosnia and Herzegovina. National education], Beograd, Ministarstvo prosvete, 1940, pp. 160-168.

⁹ Archive of Yugoslavia, Ministry of Education, 4927/38 (AJ MPs 4927/38).

¹⁰ L. Bjelić, *Udeo učitelja kroz narodnu školu u stvaranju i izgradnji Jugoslavije* [Number of teachers in national schools during the building of Yugoslavia], in M. Majstorović (ed.), *Pedagoška Jugoslavija 1918-1938*, Beograd, Pedagoška biblioteka Jugoslovenskog učiteljskog udruženja, sv. 9, 1939, pp. 321-324.

one school for 6,330 citizens¹¹. It was registered in the 1930's that ten times more financial resources went to one student than to a pupil. The regions populated with Serbian inhabitants were exceptions. Nevertheless, the greater percentage of the money directed to education was given to higher, secondary, education than the primary one¹². The secondary education was reserved for the children of wealthier families and those who could afford to attend this type of education¹³. In 1939/40 the Ministry of education even brought a decision to limit admission of Jewish children into secondary schools. The broad-minded professors reacted promptly against this segregation. The school were obviously a weapon of politics and open-minded educational workers organized strikes, walkouts and silent obstructions in order to compete against current state policy¹⁴.

In this context, national cultural and educational associations (Napredak, Gajret, Prosvjeta) started to play an important role in developing culture and education in Bosnia and Herzegovina during the 20th century. Those associations were linked to the religious and ethnic side of each population group of BiH and were established during the Austria-Hungarian Monarchy. They worked all the time very successfully, organizing various cultural, educational and social events. In the interwar period, they made substantial efforts to organize basic literacy courses for the village population that was mostly illiterate. In the beginning, the newly established government supported these initiatives and organized similar courses for illiterate soldiers which became the prime goal for the government. However, they enforced teaching in Cyrillic. As those courses organized by the national cultural and educational associations became successful and eagerly accepted by people, the regime started to consider them as a threat to its official ideology. Consequently, the initiatives of such courses were seen as obstacles and distraction¹⁵.

Therefore, after the proclamation of the Law on National Schools in 1929, these private courses were under constant official control until they were prohibited. For example, the Croatian Cultural Society *Napredak* organized basic literacy courses mostly for the Catholic population in BiH. It was recorded that this society organized 50 courses for 1,800 attendees in the period from

¹¹ *Izveštaj Zemaljske vlade za Bosnu i Hercegovinu: Stanje prosvete u Bosni i Hercegovini na dan oslobođenja* (2. mart 1920, AJ/ON-924) [Report of the state government for BiH: Situation in education in BiH on a Liberation day (March 2, 1920, AJ/ON-924)].

¹² S.M. Džaja, *Društvo Napredak u jugoslavističkom razdoblju* [Association Napredak in Yugoslavian period], in *Stoljeće HKD Napredak (1902-2002)* [Hundred years of the Association Napredak], HKD Napredak Sarajevo, HKD Napredak Zagreb, 2007.

¹³ Miljković, Batinić, *Iz povijesti hrvatskoga srednjega školstva u razdoblju od 1918-1940* [From the history of Croatian secondary education in the period 1918-1949], cit., p. 520

¹⁴ Bevanda, *Pedagoška misao u Bosni i Hercegovini, 1918-1945* [Pedagogical thought in Bosnia and Herzegovina], cit., p. 80.

¹⁵ Džaja, *Društvo Napredak u jugoslavističkom razdoblju* [Association Napredak in Yugoslavian period], cit., 144.

1929-1930. The Muslim population also participated in these courses but the Orthodox did not attend them¹⁶. Despite all of these efforts, the results were symbolic. The reasons were numerous, primarily of political and ideological nature. A travelling teacher Emil Rajić who was engaged by *Napredak* to organize basic literacy courses in the 1930's in Travnik region witnessed this injustice. He wrote the following about this situation:

the one who live in town and never visit village would be hardly able to understand the dreadful position of peasants [...] While we read in books about education and social life in villages written by those who write for money, the situation is quite opposite... Eternal slavery and tyranny in the past created ignorant working character of peasants. They became selfish, greedy and bitter. The character of the peasant could be compared with a village path that goes through the fields, hills and valleys. Even if he sees the good side of literacy, he does not want to deal with it. The village leaders are the basic opponents towards literacy. They are afraid of losing their power and authority because they themselves are illiterate [...] ¹⁷.

Illiteracy was the main barrier for a proper development of the country and investment of modern changes in the 19th century. Literacy became a measure of development, progress, social status and also a sign of belonging to the West. The literacy was mainly adopted in the schools, but in the period of lacking schools and teachers, an alternative needed to be prepared. The courses for adults were seen as a proper solution but the lack of teachers caused another problem. To this end, cultural associations stepped forwards and dealt with this issue. Catholic and Muslim populated regions were in a worse position and something had to be done. Of the 335,000 pupils who needed to attend schools only 134,404 were attending schools in the 1937/38 school year¹⁸.

According to the 1929 Law, the basic literacy courses were announced as national schools and only official staff could be engaged to work in them. To overcome this gap, the idea that literate persons educate illiterate once even in the same family got its real practice on the ground. This action was successfully applied in Herzegovina by the Franciscan friar and educator Didak Buntić. The network of those who ignored state orders and set up home tutoring was very well organized. *Napredak* founded reading rooms or held lectures during the long winter nights around the fire in family circles¹⁹. However, female illiteracy was a growing problem. The different status of women in society and family was evident. *Napredak* wanted to organize courses for women led by women in order to escape prejudices and traditional views of women's position within a

¹⁶ *Ibid.*, p. 143.

¹⁷ *Ibid.*, p. 145.

¹⁸ S. Leček, *HKD Napredak i Seljačka sloga u borbi za pismenost* [Napredak and Peasant unity in the struggle for literacy], in *Stoljeće HKD Napredak (1902-2002)*, HKD Napredak Sarajevo, HKD Napredak Zagreb, 2007, p. 370.

¹⁹ *Ibid.*, pp. 378-379.

male-centered environment. This association considered female literacy equally important as that of men. There was a meeting in Sarajevo in 1939, organized by the Croatian women association where this matter was discussed. As a result, it was agreed that during the winter period, some courses would be organized in villages. But then again, there were still regions without any literate women²⁰.

In the towns, situation was organized in a better manner and professional teachers were in charge of teaching and lecturing. Even though the lack of teacher was evident, the minister of education from Belgrade referred to hyperproduction of intellectuals which influenced his decision to close gymnasiums and teacher training schools. As a result, a huge number of teachers found themselves without jobs at a time when 550,000 children of school age did not attend school. Those who still worked at school were under constant control of the school's inspectors who monitored their ideological activities and fulfillment of their duty²¹.

Thus, it was not strange that in a country with so many illiterates among the adult population, one enthusiast from Split, Croatia, came to Sarajevo to face this problem and to show how an educated person could affirm his own life and contribute to the whole community. Some gaps related to education had to be filled and Vidović saw his chance. He mostly worked in Sarajevo, but after some years, he visited people in smaller places and realized his dissatisfaction with living conditions and lack of the institutional interest for their destiny. His network of followers was able to work remotely, giving an opportunity to those who were financially impaired to get a better education. Two facts marked the society of the post-war period: a large percentage of illiterate and semi-educated people. As Salih Ljubunčić pointed out, «The semi-educated are those who give everything to their outfit, who cover themselves with a masque of humanity and nice behavior. This type of people is numerous and is present everywhere in society»²². According to Ljubunčić, this type of people obtained important functions by confusing people, and demoralizing society, providing a sense of dilettantism, quasi-culture and great measure of ignorance. In 1937, BiH had approximately 2,323,000 inhabitants. Based on the data for that school year, the school network included only 40 percent of children of school age. At the same time 60 percent of children of the same age were left out of school²³.

²⁰ Leček, *HKD Napredak i Seljačka sloga u borbi za pismenost* [Napredak and Peasant unity in the struggle for literacy], cit., p. 372.

²¹ S. Šušnjara, *A school for adults, a Balkan educational phenomenon*, «Rivista di storia dell'educazione», vol. 5, n. 1, 2018, p. 335.

²² S. Ljubunčić, *Vidovićeve škola kao kulturno-etički i socijalno pedagoški pokret* [Vidović's school as the cultural-ethical and social pedagogical movement], Sarajevo, Nakladna biblioteka «Uzgajatelj», 1925, p. 27.

²³ Leček, *HKD Napredak i Seljačka sloga u borbi za pismenost* [Napredak and Peasant unity in the struggle for literacy], cit., p. 370.

Table 1. Range of illiteracy in Bosnia and Herzegovina²⁴

	1921 general range of illiteracy	1931 general range of illiteracy
Yugoslavia	50.5	44.6
Serbia	53.5	46.9
Croatia	37.5	31.5
Slovenia	8.9	5.5
Bosnia and Herzegovina	78.2	70
Macedonia	77.4	67.5
Montenegro	62.5	56.1

Teacher's position as a sign of bad times

The political statement was that the basis for construction of new states in the whole of Europe had to be linked with forming of a new man. This was not an easy mission. In the post war period man became wicked, corrupt, selfish, immoral. The youth was unscrupulous and shameless. «People usually drill animals but they often cannot train themselves to be more human»²⁵. Teachers were in an unbearable position. They were forced to follow some ideological instructions and to promote them through their lectures even though they disagreed with the prescribed contents. The Ministry of Education from Belgrade kept issuing new regulations and orders, especially after 1925. This attitude indicated that the old secondary school of pedagogical standard would be converted into the secondary school of bureaucracy. At the same time, teachers were not asked for their opinion. The authorities came up with imposed regulations for every possible issue. Regulations were everywhere but school materials, furniture, school books and other literature were missing. The general impression was hopeless. A large number of teachers went through the war which took the best parts of their life. The salary of teachers was minor and inadequate, thus forcing to give private lessons or to find other additional jobs. Teachers in this position did not have enough energy to continue educating their students with the previous passion²⁶. Teachers were deprived in every sense and they wrote articles about the situation in schools referring to incorrect political decisions that ignored their expertise and knowledge. A. Visković made the following observations on this matter:

²⁴ Miljković, Batinić, *Iz povijesti hrvatskoga srednjega školstva u razdoblju od 1918-1940* [From the history of croatian secondary education in the period 1918-1949], cit., p. 520.

²⁵ F. Nikolić, *Naše srednje škole* [Our secondary schools], «Nastavni vjesnik», vol. 30, n. 1, 1921-1922, pp. 2-5.

²⁶ I. Blažević, *Đački odgoj izvan škole* [Upbringing of a pupil outside of school], «Nastavni vjesnik», vol. 34, n. 2, 1925-1926, pp. 58-59.

The Ministry formulated what student needs to know and professor as inquisitor was in charge to control if someone would smuggle through without the prescribed knowledge. The worst of all is maturity exam. The most absurd of all systems, like the system of lottery, was the process of checking the memory of candidates who need to prove that they remembered all prescribed contents. After that they would be proclaimed as matured. Memory is a virtue that cannot produce a smart bird from a parrot. Even more, it cannot be criterion of a human value. However, it seems that good memory is practically the only virtue that one needs to permit in today's school²⁷.

Teachers who were aware of this depraved situation in the country and who wanted to teach their students how to learn properly and how to use the obtained knowledge practically were exposed to unpleasant occurrences and public accusation. One author wrote that relation between teachers and their students only mirrored the situation in society in general.

The expert teacher, usually unsatisfied with his relatively degraded formal career, does not approach the student as a Socrates teacher who gives an easy delivery to a student's personality using all sources of pedagogical and psychological means. No, he comes up as the 'authority' who needs to fill student's head with this 'ragout' in keeping with the prescribed recipe: from everything a little, but nothing constituent (dr.Ozvald). In the most critical years of his life a student has to accept knowledge delivered by others passively and not participate actively in self-education [...] The student has to lose himself, to break down (the tree is breaking in its early phase), or to go deep down until misery passes²⁸.

One author claimed that motivation of students would be better if they were aware of the importance and sense of contents they learned. This approach would be clear if they started to learn from exact and concrete example from everyday life²⁹. Vidović criticized the school of that time as well as the way of its treatment of pupils. He warned that those schools were not place of pleasant, vivid activity inviting all teachers to do something to change this situation. He claimed that the atmosphere in schools was too intellectual without human touch. «I know what is in the human being and I want to awaken his spirit and inner personality and build my pedagogical system on it»³⁰. Some teachers became his followers, but others were rigid opponents who wrote about his work and ideas negatively, emphasizing his ethical ideas and approaches as those of a heretic or fanatic³¹. Great number of teachers participated in the

²⁷ Visković, *Problem srednje škole* [Secondary school's problem], cit., p. 424.

²⁸ *Ibid.*, pp. 423-425.

²⁹ D. Franković, *Problem discipline u našoj srednjoj školi* [Issue of discipline in our secondary school], «Napredak», vol. 47, 1939, p. 389.

³⁰ N.N., *Na raskršnici duha (Osvrt na predavanje g. Miljenka Vidovića)* [At a crossroad of spirit (An overview of M.Vidović's lecturing)], «Narodna straža», vol. 43, 1926, p. 1.

³¹ S. Šušnjara, *Vidovićeva škola za odrasle, prosvjetni fenomen u Bosni i Hercegovini između dva svjetska rata* [Vidović's adult school, educational phenomenon in Bosnia and Herzegovina between the two world wars], in *Zbornik radova, Znanstvena misao u Bosni i Hercegovini, Federalno ministarstvo obrazovanja i znanosti, Mostar, 2017*, p. 775.

educational activities of abovementioned national cultural associations but also published their articles in the journal «Uzgajatelj» pointing out at social, cultural and educational issues that needed to be improved or reformed.

Vidović's educational approach and the journal «Uzgajatelj»

Aware of all obstacles and social injustice, unsatisfied with current educational school practice, Vidović decided to involve some changes in this field. He was a very talented student who succeeded to finish eighth grades of gymnasium in Split in one year. Miljenko Vidović was born in Primošten near Šibenik in today's Croatia in December 1884, where he finished a six-year elementary school. His family was not prosperous enough to send him to secondary school. When he was 22, his family went to Split, in 1906. School was a big challenge to him and he asked his father to send him to a gymnasium. As a self-educated person he gave a promise that he would finish a complete gymnasium program in a year. Despite the doubts of his friends and relatives, he kept supporting himself by words, «if nobody did, I will. I will be the first who does it»³². He finished this task successfully and went to Zagreb to study law. It appeared that law was not a proper choice for him and he applied to the Technical School in Vienna. This was a time when reform pedagogy started to flourish as a specific and characteristic historical and pedagogical phenomenon at the beginning of the 20th century. This pedagogical approach had characteristics of a revival movement meaning a return to spontaneous way of children's life, close lifelong of learning, and to unity of spirit, body, work and learning, as Liesmann emphasized³³. Therefore, new school and new education were propagated and the semantic of reform pedagogy influenced educational mainstream, bringing everything 'new' in the schools. The movement of working school was one of the strongest and most influential movement of reform pedagogy and it was usually seen as a synonym of new school³⁴. The working approach as a pedagogical approach was found and was present in almost all spheres of pedagogical development. Its importance was emphasized by pedagogical classics such as Komenski, Rousseau, Pestalozzi, Froebel, Herbart, and others³⁵. «Learning by doing» was a slogan promoted by John Dewey who strongly

³² P. Radosavljević, *Vidovićev rad* [Vidović's work], «Uzgajatelj», n. 8-9, 1926, p. 179.

³³ K.P. Liesmann, *Teorija neobrazovanosti: zablude društva znanja* [Theorie den Unbildung. Die Irrtümer der Wissensgesellschaft], Zagreb, Jesenski i Turk, 2008.

³⁴ W. Scheibe, *Die reformpädagogische Bewegung 1900-1932*, Weinheim und Basel, Beltz Verlag, 1999, p. 46.

³⁵ Š. Batinić, *Povijesni razvoj i recepcija reformne pedagogije u Hrvatskoj* [Historical development and reception of the reform pedagogy in Croatia], Doctoral Thesis, Department of pedagogy (Supervisor Vlatko Previšić) University of Zagreb, 2014.

influenced the European pedagogical community in the first decades of the 20th century inventing progressive education by promoting new methods in learning and teaching as well as various didactic and other innovations in education³⁶. Dewey considered that man was an active human being and learning needed to be based on experience from the real environment. Kerschensteiner implemented three tasks of school: vocational education and training (Berufsbildung), morality of education and morality of community. Fulfilling these three tasks, an individual gains moral as well. This was a difference between new and old school which dealt primarily with the intellectual interest of children but not with their practical and technical skills³⁷.

Vidović was brilliant in math and this talent was very soon recognized by the faculty members. He prospered in solving a difficult task of angle trisection and the professors' board was overwhelmed with his outcome. Vienna's newspapers published articles referring to the Slav who solved the problem better than the famous scientist Dürer. Despite all these good results, he returned home at the beginning of the First World War. He found a job as a rail-way officer in Knin, Croatia. There, he became aware of the hard life of the largely uneducated population. He started to educate young people and communicate with them about their interests and wishes transferring reform educational concepts that he embraced abroad. Unfortunately, he made some politically incorrect actions and was forced to flee the country. He arrived in Sarajevo in 1919 where he found a similar situation among common people and noticed that the school system was not prepared to deal with this issue³⁸. The adult population needed some additional support in education but nobody offered any program or courses for them. Intelligent as he was, Vidović saw a challenge and he opened evening courses for the workers and other young people who left their education in some difficult periods of their lives. He noticed their readiness to prove themselves and show that they could fulfill some missed goals. They were persistent in their attendance of the course and the first results appeared very soon. The number of adult students increased and Vidović decided to open the school for adults. This was an important step in his career but also a red flag to some state educational institutions. Some professors publicly confronted him and his ideas calling him as an impostor or charlatan. As Vidović promoted a new ethical movement attempting to incorporate these ideas into his educational practice, this aspect additionally confirmed the accusation of those who represented public opinion makers³⁹. Vidović's movement was widespread in the entire region of the state thanks to his school of distance education, library «Uzgajatelj» and journals

³⁶ J. Dewey, *The School and Society*, The University of Chicago Press, 1990.

³⁷ G. Kerschensteiner, *Begriff der Arbeitsschule*, Leipzig, Berlin, B.G. Teubner, 2017.

³⁸ P. Radosavljević, *Vidovićev rad* [Vidović's work], «Uzgajatelj», n. 8-9, 1926, p. 179.

³⁹ S. Šušnjara, *Ideje reformne pedagogije u djelovanju Miljenka Vidovića u Bosni i Hercegovini* [The Ideas of Reform Pedagogy in the Activities of Miljenka Vidović in Bosnia and Herzegovina], «Acta Iadertina», vol. 1, 2017, pp. 15-26.

«Uzgajatelj», «Novi čovjek» and «Novi vidici». The journal «Uzgajatelj» dealt with the topic of reform pedagogy in the perspective of the common social and cultural development⁴⁰. This magazine published articles of leading world and local pedagogists who attempted to implement positive changes into school work and encourage pupils but also teachers to create a concrete and constructive teaching process based on new accomplishments. Vidović's activities were known in each part of the country, but also abroad, especially in Canada and America where his journals were delivered. Thus, American journals used to distribute articles from «Uzgajatelj»⁴¹ such as «The New York World» that published articles *Naše ogledalo* [Our mirror] on March 8, 1925 and *Nesavremena inteligencija* [Unmodern intelligence], on March 10, 1925⁴².

One of the author who regularly published in «Uzgajatelj» was Paja Radosavljević, a University professor from New York⁴³. During his visit to Mostar where he used to work as a teacher many years ago, he held a lecture emphasizing that «our current schools with their gathering of knowledge does not do their pedagogical mission nor create capable and qualified citizens»⁴⁴. By mentioning public and private schools, Radosavljević stated that the power of the United States was at first based on the educational private initiative which was supported by the state. He also pointed out that the private schools of Pythagoras, Socrates, Pestalozzi, Rousseau and Montessori exceeded public schools stressing that «all pedagogy was rooted not in public but in private educational institutions»⁴⁵. The journal «Uzgajatelj» also printed articles from other magazines that were focused on the phenomenon of Vidović's school. The journal «Slovenski» narod from Slovenia issued an article about the adult school. Hugo Bajuk, the author of the article came to Sarajevo instructed by prof. Osvald from Ljubljana who was intrigued with the phenomenon of the school. Bajuk wrote very positive findings about school and its founder⁴⁶. «Česke večerne slovo» from Prague also published articles about Vidović school and «Uzgajatelj» from 1924 reissued that article. Ljubunčić was a regular correspondent of «Uzgajatelj» as well as many other teachers from Croatia

⁴⁰ Š. Batinić, *Povijesni razvoj i recepcija reformne pedagogije u Hrvatskoj* [Historical development and reception of the reform pedagogy in Croatia], Doctoral Thesis, Department of pedagogy (Supervisor Vlatko Previšić) University of Zagreb, 2014.

⁴¹ Bevanda, *Pedagoška misao u Bosni i Hercegovini 1918-1945* [Pedagogical thought in BiH, 1918-1945], cit., p. 80.

⁴² «Uzgajatelj», vol. 4, 1925.

⁴³ Paja Radosavljević was a profesor in USA and contributed a lot to experimental psychology. Most widely held works by Paul R Radosavljevich is Who are the Slavs? He contributed with his articles in the journal «Uzgajatelj» (Experiments in education of laborers, Lay's studying of children's plastic art, Pedagogical instruments of progress, Egoism and altruism in the culture of humanity, Pedagogical educational boiling in the world).

⁴⁴ M. Vidović, *Prof. dr. Paja Radosavljević*, «Uzgajatelj», n. 8-9, 1925, p. 314.

⁴⁵ *Ibid.*

⁴⁶ H. Bajuk, *Vidovićeve škola za odrasle s maturnim tečajem* [Vidović's adult school with maturity course], «Uzgajatelj», vol. 10, 1924, pp. 376-378.

who published their articles in this journal: Jagoda Truhelka, Jure Turić, Kamilo Brossler, Mato Lovrak, Davorin Trstenjak, Stjepko Ilijić, etc. Elements of reform pedagogy were evident in their texts and educational concepts⁴⁷. However, traditional, dogmatic and normative pedagogy was criticized to a great extent in this journal⁴⁸. It was proclaimed at the beginning of the 20th century, also called «the century of a child» that treatment of pupils during the teaching process need to be done in a more human and qualitative way⁴⁹. Vidović emphasized in his articles that an educational reform he searched for was evident in the practical four-year experience of his school for adults where new pedagogical methods were marvelously applied⁵⁰. The inactivity of the new state, the Kingdom of SHS and its educational policy in comparison with modern tendency in education substituted the professional activism and intensive pedagogical work of teachers and pedagogues who were engaged in all important domains of education. In the state that ignored education except as a tool for promoting its political and ideological goals, professional influence on school organization and reform of the school system was very limited. However, terms such as: new school, new epoch, new tasks, new education, new methods, new pedagogy, new is better than old one, new is future, old is the past, new is a challenge, old is a ballast, were constantly repeated in the articles published in pedagogical journals. What did the syntagma of new school really mean in Yugoslav pedagogical practice in the period between two wars? Probably the best response was given by Serbian pedagogue Vasilije Pejhelj who claimed that new school was «an ideological protest against old school, life and work approaches»⁵¹. He also pointed out that the term new school did not mean a concrete school system or a form of traditional school but that it was simply every scientific attempt to reform a traditional school. However, the term new school could be identified with the term active school or work school⁵².

⁴⁷ Batinić, *Povijesni razvoj i recepcija reformne pedagogije u Hrvatskoj* [Historical development and reception of the reform pedagogy in Croatia], cit.

⁴⁸ Bevanda, *Pedagoška misao u Bosni i Hercegovini, 1918-1945* [Pedagogical thought in BiH, 1918-1945], cit., p. 81.

⁴⁹ Batinić, *Povijesni razvoj i recepcija reformne pedagogije u Hrvatskoj* [Historical development and reception of the reform pedagogy in Croatia], cit.

⁵⁰ M. Vidović, *Dopisna škola za odrasle* [Adult school of distance education], «Uzgjatelj», n. 6-7, 1924, p. 226.

⁵¹ V.A. Pejhelj, *Nova škola* [New School], Šumadija, Kragujevac, 1932, p. 56.

⁵² Batinić, *Povijesni razvoj i recepcija reformne pedagogije u Hrvatskoj* [Historical development and reception of the reform pedagogy in Croatia], cit.

The Adult school in Sarajevo

In the ambiance of the post war lethargy, it was essential to foster the revitalization of the school and to empower teachers and students to make changes in education. Teachers wrote articles about necessity to refresh teaching practices, to bring some modern approaches, to listen to students' needs and discover their capabilities. The school system needed a new, modern educational structure and program. «They are schools of scholastic approach, uncolored life, swelling with scientific disciplines that are just sterilized from a strong affirmation of will and feelings»⁵³. Thus, Ljubunčić who was a professional teacher but also very devoted follower of Vidović's ideas, persistently wrote about Vidović methods and schooling, warning that life itself was a fertile field for the science whose aim was to educate individuals as free persons. In the rich discussion on reform pedagogy in the interwar period, there were representatives who understood the development of the school community as the following of an advanced spirit, a sophisticated cultural principle or a charismatic leader like Vidović appeared to be. Vidović's students were factory workers, artisans and their assistants, various clerks and many others, regardless of their social background, sex or religion. Ljubunčić claimed that these workers did the hardest jobs. For the first time, they felt that someone showed an interest in their own needs, work and abilities. They felt wanted and allowed to speak loudly in this supportive environment⁵⁴. They did not start with education in those first meetings. After an introduction, they began to talk about social, national, cultural and class issues. Their need for additional education was evident. Vidović became a sort of leader to these group of enthusiasts gathered in the school every night after finishing regular job. The school started at 18:00 and last until 22:00. For the majority of these workers and students, this school became the only place where they were treated as equals, no matter what their previous education was. This school was a shelter for them or a place in which they were advised to quit some bad habits and adopt better ones⁵⁵. This coincided with Rousseau's idea that schools need to educate to be a human being above all and not just a soldier, lawyer or priest⁵⁶. Ljubunčić critically observed schools of that time, explaining that they were places for education of workers and servants, not allowing them to become someone

⁵³ K. Broessler, *Narodni prosvjetni preporod i Vidovićev moralno-etički pokret* [National educational renaissance and Vidović's moral-ethical movement], «Uzgajatelj», n. 3-4, 1926, p. 86.

⁵⁴ Ljubunčić, *Vidovićeva škola kao kulturno-etički i socijalno pedagoški pokret* [Vidović's school as cultural-ethical and social-pedagogical movement], cit.

⁵⁵ Šušnjara, *Ideje reformne pedagogije u djelovanju Miljenka Vidovića u Bosni i Hercegovini* [The ideas of reform pedagogy in the activities of Miljenka Vidović in Bosnia and Hercegovina], cit., pp. 15-26.

⁵⁶ J.J. Rousseau, *Emil ili o uzgoju* [Emile or about education], Zagreb, Hrvatski pedagoško-književni zbor, 1887.

better and efficient. Ljubunčić also wrote a book about this school praising its founder as a brave and inspired visionary. Such an approach attracted so many attendees every night. The educational, cultural and ethical approach of the school founder fascinated people from all regions of the Kingdom. They became new people, as if they were newborn, discovering their possibilities and talents, emphasized Ljubunčić. The basic program of his educational efforts was «cultural science»⁵⁷. Teachers gathered around Vidović school were thoroughly acquainted with the issues of progressive and experimental pedagogy from professional literature and from the pedagogical press.

This school was the first adult school in the Balkans, a completely new phenomenon at the educational scene. People from all over the country used to come to this school in order to participate in its work. The school was not authorized to give a diploma, but their students were so well prepared after finishing it that they passed their final exams in state schools very easily. There were 200 students who contributed to the school's importance and enforcement. Ljubunčić pointed out that they were at the same time members of a spiritual community. This is school of life and a working group in which every individual went free from his chains that held him back. They discovered their life mission and social tasks in this school⁵⁸.

This school found its place in people's hearts at a very special moment. As was presented above, the country was weak and fragile after the recent war's suffering. People lived in poverty, especially the village population, so education were not its priority. Vidović made researches in the field in order to establish the reasons for such poor education and people's resentment. He focused his work on human beings as individuals and on society in a global sense. He learned from his own experience during his studying in Europe and from educational reading, quoting Komenski «School is a frightening place for boys and torture for spirits»⁵⁹, Tolstoj «Education is supposed to be a free and willful meeting of the teacher and the pupil, and not a forced act»⁶⁰, Gaudig «a student needs to have a method»⁶¹. The impact of working school that started to expand in Europe at the beginning of 20th century was evidently presented in his educational work. Even though the working school methods became official pedagogical mainstream in the country, Vidović did not find similarities with propagated official ideas and practices on the ground. His approach to every student's needs and concentrated listening and affection for their educational goals and wishes to improve their position provided him the status of a real

⁵⁷ Ljubunčić, *Vidovićeva škola kao kulturno-etički i socijalno pedagoški pokret* [Vidović's school as cultural-ethical and social-pedagogical movement], cit., p. 45.

⁵⁸ *Ibid.*, p. 15.

⁵⁹ Komensky, *Velika didaktika* [Didactica Magna], cit., p. 87.

⁶⁰ L.N. Tolstoj, *O narodnom obrazovanju* [About national education], Zagreb, Hrvatsko društvo za unapređenje uzgoja, 1912.

⁶¹ Gaudig, *Die Schule im Dienste der werdenden Persönlichkeit*, cit., p. 53.

teacher, one who really lives what he taught. That was something new in school practice and almost not real. As one critic states: «Vidović's school has this distinctiveness that it could be called as a real people's school, because of its participants who come from all social classes»⁶². As Vidović assessed everyday school practicing as 'educational torture'⁶³, he wanted to restructure the school system in accordance with the reform pedagogy mainstream that have been recognized as a special historical and pedagogical phenomenon in Europe at that time. Following reform pedagogy with different forms of school conceptions, he searched for changes of teaching methods and transformation of the school system. It was evident that schools which adopted and promoted didactic concepts of reform pedagogy influenced current pedagogical theory and practice in Europe. Vidović eagerly found this model of schooling to be very human, practical and open to students. Therefore, he applied the basics of reform pedagogy in his educational practice promoting in this way adult school as the first school of that kind in Yugoslavia. He wanted to create something new, a sort of new school that would oppose the old school system and prevailing pedagogical trends⁶⁴.

Reporting about the International Professor Congress at which he participated, Vidović found similarities with his intentions, ideas and achievements that were presented by the respected lecturers from around the world. He also wrote about the conclusions of the Congress indicating secondary school educational issues. It was revealed that the intelligence of students needs to be developed properly but not by burdening them with various information. Exams should be minimized as well as the high demands of faculties: Dalton plan and new school were seen as an example of making a proper school schedule. Vidović reflected that this would guarantee fewer hours of lecturing and more hours of individual work in special classrooms and under the supervision of one teacher. Therefore, he commented with pleasure:

We must humbly admit, that the Congress acknowledged all those ideas which our school and journal fought for in the last three years. Because of those ideas related to education we suffered a lot and were attacked verbally. This congress is the great satisfaction for us and it reinforces our educational reform attitude giving the strength and energy into our souls to keep following our way of spiritual restitution and better moral education⁶⁵.

⁶² H. Bajuk, *Vidovićeva škola za odrasle s maturalnim tečajem* [Vidović's adult school with maturity course], «Uzgajatelj», vol. 10, 1924, p. 377.

⁶³ M. Vidović, *Šta može uzgoj* [What upbringing can do?], «Uzgajatelj», 1924, p. 1.

⁶⁴ Šušnjara, *Ideje reformne pedagogije u djelovanju Miljenka Vidovića u Bosni i Hercegovini* [The ideas of reform pedagogy in the activities of Miljenka Vidović in Bosnia and Hercegovina], cit., pp. 15-26.

⁶⁵ M. Vidović, *Međunarodni profesorski kongres* [International professors' congress], «Uzgajatelj», n. 6-7, 1925, p. 327.

Opponents of the school and Vidović's mainstream

In order to accomplish his mission in a more efficient way, Vidović founded a pedagogical journal «Uzgajatelj» dealt with issues of reform pedagogy within the context of general social and cultural development, as well as some other publications («Novi čovjek», «Novi vidici»). He constantly wrote against regular education marking it as archaic and without practical use. «It seems that some people want to place science in some mysterious frame preventing it to wider classes. Science is not some secret power which is available to some selected people only»⁶⁶. Teachers who saw him as an imposter and the one who saw himself as the almighty person, started to write reflections about him and his methods as a response to his arrogant critiques. They came to meetings where he presented his ideas and confronted him with adequate arguments. He even criticized people's religious feelings and proclaimed his ethical movement as the right one. «Religion does not prepare man to do right things! It goes beyond evil not taking care of man goodness»⁶⁷. This rhetoric additionally annoyed people and they started to write notes to the authority claiming that: «His movement was irreligious and antireligious»⁶⁸.

Gymnasium's professors were especially provoked and they publicly accused Vidović. They claimed that he purposefully ignored those educational workers who kept and nourished education in this country, those who were not afraid to speak loudly and to fight for their own prosperity. They could not allow Vidović to take a credit for their achievements. Vidović could make his expose on teaching subjects but he could not teach them how to do their work. Moreover, he dared to preach about their pedagogical attitudes and knowledge. If he gained results in a short period of time using his own pedagogical approach, it was not well-mannered to cause discrimination and injustice to others, because «injustice is not allowed by clear human ethics as such»⁶⁹. The religious groups also considered the growth of ethical movement as an unacceptable performance, an act that provoke misperception amongst people. They denounced those who wrote for journal «Uzgajatelj» as «atheists, admirers of Nature, polytheists, Kant's followers, Schopenhauer's followers – everything and nothing were there»⁷⁰. His ethical movement in its organizational structures and presented ideas showed that he blindly followed foreign movements for ethical culture.

⁶⁶ M. Vidović, *Dopisna škola za odrasle* [Adult school of distance education], «Uzgajatelj», n. 6-7, 1925, p. 226.

⁶⁷ *Na raskršnici duha (Osvrt na predavanje g. Miljenka Vidovića)* [At a crossroad of spirit (An overview of M. Vidović's lecturing)], cit., p. 1.

⁶⁸ *Ibid.*

⁶⁹ A. Živković, 1. Vidović, Miljenko, *Za zapadnu kulturu ili protiv nje* [For Western culture or against it], «Vreme», vol. 2, 1927, Ideje i problem. Sarajevo, Obod, 3. Vidović, Miljenko. 1927. *Faktor rada – evanđelje života*, «Bogoslovska smotra», n. 15, p. 505.

⁷⁰ *Na raskršnici duha (Osvrt na predavanje g. Miljenka Vidovića)* [At a crossroad of spirit (An overview of M. Vidović's lecturing)], cit., p. 1.

Cultural-ethical movement of Miljenko Vidović in his basic idea did not bring anything original or new. Even-though in his articles in «Uzgajatelj» and «Novi čovjek» he called for a new life, new sun, new tasks, new ideals, there was nothing new in these syntagma. These messages were sent by the first founders of ethical culture with the same excitement but in a different form. His word was strongly echoed in our region. In the organizational structure of the movement, Vidović strictly followed already known paths. First, the opening of the school as a basic cell for movement. Then, ensuring the first circle of followers and listeners. After that, he worked on actions outside of Sarajevo, advertising information through the journals «Uzgajatelj» and «Novi čovjek» in Sarajevo, and Novo svjetlo in Zagreb. The founding of branches, forming of clubs and finally organizing a Congress were the following actions. The Congress was organized in Sarajevo in 1925, where it was concluded to establish so-called society for ethical movement promotion with all necessary regulations⁷¹.

Nevertheless, Vidović succeeded to make changes and to provoke officials to move on and improve the field of education. He was brave enough to suggest modifications and to promote them in practice. His school of distance education also showed good results. He became famous and was invited to public debates with his opponents. However, the school vanished after some years of functioning. Despite its popularity, the school was closed and Vidović went to Belgrade in 1937, where he opened a similar school and was the leader of cultural-ethical movement of Yugoslavia. In 1941, he returned to Split where he worked as a professor in classical gymnasium from 1948-1960. His cultural-ethical and social-pedagogical movement was systematically ignored after the Second World War in the former Yugoslavia. If somebody even mentioned him, the context was negatively inclined. The movement was considered as demagogic and Vidović was described as the one who distributed Nietzsche's concept of 'the Superman' and supported theories that were a basis for fascistic ideology⁷².

Conclusion

As it was already presented above, Vidović's school for adults was a special phenomenon in the Balkans in the interwar period. It was sort of an educational expedition that annoyed and challenge the political, social and educational

⁷¹ *Predavanja iz etike dr. fra Leona Petrovića* [Lectures from ethic of Franciscan Leon Petrović], in *Hercegovina franciscana*, vol. IV, n. 4, 2008, pp. 273-308.

⁷² Sušnjara, *Ideje reformne pedagogije u djelovanju Miljenka Vidovića u Bosni i Hercegovini* [The ideas of reform pedagogy in the activities of Miljenka Vidović in Bosnia and Hercegovina], cit., p. 18.

community of that time. Against the traditional preoccupation of the school, the initiator of adult school intensified confusion amongst teachers and amongst those who were in charge to making decisions about the school system. His intention was to create a new kind of school, a school that could contradict the old school and ongoing pedagogical trends. From some experts' views, his efforts were seen as a significant course in the process of school reform, because he investigated modern pedagogical achievements in Europe with a plan to include them in his working environment. Following the findings of professor Radisavljević who was the propagator and representative of positivism in psychological and pedagogical science at that time, he brought a new model of teaching based on a firm determination of students and teachers to create a positive classroom's ambience.

Vidović was indeed, a promoter of new ideas, mostly those of reform pedagogy and working school. It is important to underline that his work was very well recognized outside of country, in Europe and the United States where he had influential supporters within the ethical movement. His attempt was to present a transcultural approach bringing, 'new' pedagogical knowledge and educational inventions into existing school practice. If it had not been for his ethical movement, his school would probably have had a longer existence. He misused people's patience talking about lack of morality and the importance of spiritual peoples' awakening. Many of his students and followers did not really understand his messages that provoked their faith and usual style of living. They only wanted to gain knowledge and to enhance their life situation. There is an example of a wood artisan from Pelješac who read about Vidović school from the page of the newspaper in which his wooden material was wrapped. He wrote a letter to Vidović and he invited him to come to Sarajevo. He arrived, succeeded, continued his education in Croatia and became a famous reporter who was awarded the honor of *Righteous Among the Nations* because he saved a Jewish friend and his family during the Second World War⁷³. This man was usually in a contradicting position because of his friend Vidović and his ethical movement. It was obvious that for an idea to come into being, there must be a change in the people's perception. Such a change must be not only of a great magnitude but of a special nature. For after one has gone through the historical complexities asking simple question whether Vidović's attempts were valued properly, and would the concept of adult education have developed differently if it had not been for the ideological influences that he wanted to integrate into his educational efforts. Therefore, he was seen as an imposter and intruder who wanted to bring changes that nobody asked for. But like any idea, especially one of educational significance, it has meant different things to different people at different times. Who can dictate how one's affairs must be managed and how

⁷³ Đ. Obradović (ed.), *Djelo novinara Rudimira Roter* [Work of the journalist Rudimir Roter], Sveučilište u Dubrovniku, 2007.

one's consciousness must be directed? Therefore, as an educational visionary he wanted to create a new environment for education, free of every ideology but not of the one that would still transmit his own spiritual tendencies completely opposite to those that people were accustomed to. His intentions were presented in a difficult period when new war was imminent. However, he left some traces at the time. He had a vision that allowed him to be a pioneer, a reformer whose efforts gained results. Many people found themselves in a new working position thank to his school and methods of learning and teaching that he presented to them. This result indicated the fact how education has contributed to a radical change in the status of students improving their social and intellectual life making further progress possible. Vidović's students witnessed the new approaches he wanted to integrate into education through his school for adults. At the same time, this school took on an aspect different than the economic, religious, and intellectual setting in which it appeared. In some instance it was enhanced; in some, neglected; in some, diminished.

Elena of Montenegro, Queen of Italy: an educational model of womanhood from Cetinje to Rome*

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ABSTRACT: The aim of this essay is to explore how the Pic. ure of Jelena of Montenegro came to be an icon of 'Italianness' as Elena of Savoy. In researching her popularized image, we will use articles and visual sources, mainly consisting of the covers of weekly magazines. Principal among these are the «Corriere della Sera», one of the most important and widely read newspapers of the time, its illustrated weekly magazine, «La Domenica del Corriere» and the illustrated weekly magazines «La Tribuna Illustrata» and «L'Illustrazione Italiana». We will show how her Montenegrin origins originally hindered her acceptance among the Italian aristocracy, but how her personal qualities and adherence to a cultural model she learnt from her family allowed her to be fully accepted and loved by the people. Popular images of Elena tended to focus on her touching children and poor and suffering people. Her maternal and caring attitude overshadowed all her other qualities and skills in the myth of "the good Queen".

EET/TEE KEYWORDS: Elena of Montenegro; Queen Elena of Savoy; Female educational models; Visual history Italy; Montenegro; XIXth-XXth Centuries.

* The article has been discussed and shared by the authors, but par. 1 is written by V. Zoric, par. 4 by D. De Salvo, parr. 2, 3, 5 and the introduction by S. Polenghi. The conclusions are shared.

Introduction

The aim of this essay is to explore how the Pic. ure of Jelena of Montenegro came to be an icon of 'Italianness'. How was her cultural background, and how did she come to be the embodiment of the Italian stereotype of a wife and mother? Transnational history refers to a history that crosses boundaries and considers both state and non-state actors¹. In examining the history of this Queen, we have researched how she was presented to the Italian people and how she changed the image of what a Queen was. Transnational history also illustrates how multiple identities can be retained in one person²: we aim to see how Jelena of Montenegro became Elena of Savoy and yet remained Jelena.

We will first reconstruct Jelena's life in Montenegro and her education, and will then go on to reveal how she was regarded with disdain by the Italian aristocracy and how she eventually became the beloved Queen of Italy. In researching her popularized Pic. ure, we will use visual sources, mainly consisting of the covers of weekly magazines. Since P. Burke's research³, the visual aspect has enjoyed increasing interest in the history of education⁴.

In analyzing how Elena was presented to the Italian public, we will not concentrate on the official photographs and pictures, also reproduced on postcards, that have already been examined by Isabella Pascucci in her valuable book⁵, but will use instead as privileged sources the «Corriere della Sera», one of the most important and widely read newspapers of the time, its illustrated weekly magazine, «La Domenica del Corriere» and the illustrated weekly magazine «La Tribuna Illustrata»⁶. We will also draw on another important

¹ E. Roldán Vera, E. Fuchs, *Introduction: The Transnational in the History of Education*, in Idd. (edd.), *The Transnational in the History of Education Concepts and Perspectives*, New York, Palgrave Macmillan, 2019, p. 11.

² R. Cowen, *Comparative, International, and Transnational Histories of Education*, in T. Fitzgerald (ed.), *Handbook of Historical Studies in Education. Debates, Tensions, and Directions*, Singapore, Springer, 2020, p. 56.

³ P. Burke, *Eyewitnessing*, London, Reaktion Books, 2001.

⁴ M. Depaepe, B. Henkens, *The challenge of the visual in the history of education*, Ghent, CSHP, 2000; I. Dussel, *The visual turn in the history of education: four comments for a historiographical discussion*, in T.S. Popkewitz (ed.), *Rethinking the history of education: transnational perspectives on its questions, methods, and knowledge*, New York, Palgrave Macmillan, 2013; K. Priem, I. Dussel (edd.), *Images as objects to think with: a reappraisal of visual studies in the history of education*, «Paedagogica Historica», special issue, vol. 53, n. 6, 2017, pp. 641-762; I. Dussel, *Visuality, Materiality, and History*, in Fitzgerald (ed.), *Handbook of Historical Studies in Education*, cit., pp. 137-152; M. d. M. del Pozo Andrés, S. Braster, *The Visual Turn in the History of Education*, in *ibid.*, pp. 893-908.

⁵ I. Pascucci, *Elena di Savoia nell'arte e per l'arte: iconografia e storia della seconda Regina d'Italia*, Torino, Daniela Piazza, 2009.

⁶ The entire collection of *Corriere della Sera* has been digitalized by the newspaper's publishing firm: <<http://archivio.corriere.it/Archivio/interface/landing.html>>. The Biblioteca di Storia Moderna e Contemporanea of Rome digitalized the covers of *Domenica del Corriere*: <<http://digiteca.bsmc.it/?l=periodici&t=Domenica%20del%20corriere%28La%29>> and of *La Tribuna*

illustrated magazine, «L'Illustrazione Italiana», which was founded in Milan in 1875 and read by the upper middle class.

The first issue of «La Tribuna Illustrata» came out in January 1890, jointly serving as the illustrated magazine of the newspaper «La Tribuna» of Rome. It was a widely read newspaper, but was surpassed by the «Corriere della Sera», in the Giolitti era. «La Tribuna Illustrata» was inspired by «L'Illustrazione Italiana», but was much more popular in style. Its covers were designed by different artists and enjoyed great success⁷.

The «Corriere della Sera» was founded in Milan in 1876 and had a middle-class liberal and conservative audience. Its readership grew in the first decades of the XX century, reaching 350,000 before WWI, and growing to 600,000 by 1920⁸. «La Domenica del Corriere» first appeared in 1899 as a free joint magazine for subscribers, but could also be bought separately at a cheap price. It was targeted at a wider public and the illustrated covers, designed by Achille Beltrame, a good realist painter who became famous as a result of them, needed to catch the readers' attention, showing the most important non-political story of the week. «La Domenica del Corriere» was highly successful, achieving double the sales of the «Corriere della Sera», reaching a wide public and surpassing «La Tribuna illustrata» in sales⁹. The covers that these magazines devoted to Elena of Savoy hence reached a very wide audience, since they were read by families, and their iconographic message was also capable of capturing children and the scarcely literate. This allows us to reconstruct the image of Elena that was offered to the common people, which was much more lively and spontaneous than the official portraits. Both magazines used illustrated covers, whereas «L'Illustrazione Italiana» covers were black and white engravings from photos, never paintings, and photos from 1900. This choice has to be reconducted to the different audience: the upper middle class for «L'Illustrazione Italiana», which had a more official style, and the lower middle class for the other two magazines, which preferred colourful paintings, with a popular appeal. Colourful paintings captured the imagination of less cultivated readers, but had to be realistic at the same time¹⁰. «La Tribuna illustrata» employed different

illustrata: <<http://digiteca.bsmc.it/?l=periodici&t=Tribuna%20illustrata%28La%29>>. Biblioteca di Archeologia e storia dell'arte of Roma has digitalized *L'Illustrazione italiana*: <http://periodici.librari.beniculturali.it/PeriodicoScheda.aspx?id_testata=1> (last access: 6.12.2020). In this case, I was only able to see the covers but not reproduce them, since the printing is not free and due to the Covid pandemic it was impossible to obtain the necessary permissions.

⁷ M. Lombardo, F. Pignatelli, *La stampa periodica in Italia: mezzo secolo di riviste illustrate*, Roma, Editori Riuniti, 1985.

⁸ A. Moroni, *Alle origini del «Corriere della Sera». Da Eugenio Torelli Viollier a Luigi Albertini (1876-1900)*, Milano, FrancoAngeli, 2005; L. Benadusi, *Il «Corriere della Sera» di Luigi Albertini. Nascita e sviluppo della prima industria culturale di massa*, Roma, Aracne, 2012.

⁹ G. Ginex, *La «Domenica del Corriere»: il Novecento illustrato*, Milano, Skira, 2007.

¹⁰ M. Lombardo, F. Pignatelli, *La stampa periodica in Italia. Mezzo secolo di riviste illustrate*, Roma, Ed. Riuniti, 1985, pp. 29, 34-35, 55.

artists with different skills, whereas «La Domenica del Corriere» covers were painted from the first number up to the end of 1944 by the talented Beltrame. His style was realistic. He went to Cetinje in 1896, hoping to paint the princess of Montenegro. Otherwise he drew from his study in Milan, but he tried to be faithful to the facts, by using photos and journalists' reports. He had his personal photo archive he consulted¹¹.

For this article, we checked all the covers that depicted Queen Elena («L'Illustrazione Italiana»: 6 covers (1896-1935), «La Domenica del Corriere»: 28 (1896-1952), «La Tribuna illustrata»: 32 (1896-1952). We selected the first ones (1896-1901), that presented Elena to the public; the ones that show her compassionate nature (1901-1937), the ones about her last days (1952) and the covers about Messina's earthquake (1909). We also checked the «Corriere della Sera», looking for articles specifically dedicated to Queen Elena and found 151 of them (1896-1952)¹².

1. *Elena's education*

Jelena Petrovic Njegos (*Elena del Montenegro*, or *Elena di Savoia* – 1873-1952; born at Cetinje) was the fifth daughter (out of a total of twelve children) of the Montenegrin King Nikola I Petrovic (1841-1921; ruled 1860-1910) and Queen Milena (1847-1923). Not only in the Petrovic family, but in the whole of Montenegro, male children were much more desirable than daughters, which was one of the indicators of a very conservative and patriarchal society. Jelena's father nonetheless loved his daughter very much and cared for girls' education. He founded the *Empress Maria's Girls' Institute at Cetinje* (1869-1913), which was motivated by what he saw in St. Petersburg in terms of educating young girls. The institute was run by famous teachers from Russia, such as the most famous Headmistress Sofija Petrovna Mertvago (1851-1921) who, like many others, had completed her education at *Smolny Institute* in St. Petersburg¹³. Montenegrin society was conservative towards women, but Nikola I was modern in educating his daughters in a context in which there was a contrast between people's habits and the court's culture. Although Jelena could have been a student at that school in Cetinje, she was educated at court, and when the time finally came for an institutional education, she was sent to the *Smolny*

¹¹ A. Lorenzi, *Achille Beltrame*, in *Dizionario Biografico degli italiani*, Istituto Treccani, 1966, available on line <[https://www.treccani.it/enciclopedia/achille-beltrame_\(Dizionario-Biografico\)/>](https://www.treccani.it/enciclopedia/achille-beltrame_(Dizionario-Biografico)/>) (last access: 13.02.2021).

¹² The entire collection of *Corriere della Sera* has been digitalized by the newspaper's publishing firm: <<http://archivio.corriere.it/Archivio/interface/landing.html>> (last access: 6.12.2020).

¹³ V. Zorić, *The development of primary school teacher's education in Montenegro*, «History of Education & Children's Literature», vol. 8, n. 1, pp. 112-117.

Institute. Official relations between Montenegro and Russia during the XIX century were extremely good, so it was not surprising that after the birth of his daughter, Nikola I decided that the Russian Tsar Alexander II Nikolajevich Romanov (1818-1881) should become her godfather at baptism, which he accepted by giving her the name Jelena.

Certain events that occurred in Jelena's early childhood left a deep mark on her personality. During the Montenegrin-Turkish War of 1876-1878, she witnessed numerous tragic scenes. Her sister Sofija died soon after birth in 1876, during wartime. When Jelena's mother Milena helped the wounded and worked in the field hospital in front of their palace in Cetinje, all her daughters helped her, including three-year-old Jelena. She looked up to her mother, patiently waiting to provide help to someone in need, to at least assist them or bring water. As a very young woman, Jelena became closely acquainted with humanitarian work, and her father was touched by her care for the poor and sick and called her «merciful».

From birth, Jelena grew up with traditional values, that is, love for family and homeland, and like everyone else in the family, she was constantly engaged in learning and physical activity. She spent her childhood with her family and took care of her younger sisters, constantly in company with them, but also in rivalry with them because a competitive spirit was something that was taken for granted in Montenegro¹⁴. The conversation at the table was almost always in French, and Jelena spent a lot of time with a Swiss governess, including in perfecting that language¹⁵. Her mother Milena was closely involved in the upbringing of her children and was crucial in transmitting family values to them. Elena grew up in a quiet and peaceful environment under her mother's supervision and with excellent domestic examples, inheriting from her mother a simplicity of behaviour, a practical spirit, gentleness of character and, above all, a strong sense of family¹⁶. Jelena learned to read and write very early and in that respect she was very attached to her father. Nikola I was a modern father, a good ruler, a famous writer and an exceptional speaker. He taught her his own and other people's songs and allowed her to take books from his well-endowed library. He dedicated his song to his daughters with the words:

¹⁴ D. Ducci, *Jelena Savojska: život pun ljubavi* [original edition: *Elena di Savoia: una vita d'amore*, Bari, Ixia, 1998], Podgorica, DOB, 2000, p. 24.

¹⁵ C. Siccardi, *Jelena, nezaboravljena kraljica*, [original edition: *Elena, la regina mai dimenticata*, Milano, Paoline, 1996], Podgorica, DOB, 2004, p. 22.

¹⁶ R. Barneschi, *Jelena Savojska* [original edition: *Elena di Savoia: storia e segreti di un matrimonio reale*, Milano, Rusconi, 1986], Beograd, Novo delo, 1988, p. 44.



Pic. 1. Princesses Jelena, Marija and Stana in Smolny Institute, from M. Jovicevic, A. Kapichic, T. Jovic, *Dvor kralja Nikole* [The court of King Nikola], Cetinje, Narodni Muzej Cetinje, 1999, p. 56

Remember, my daughter, that gold is not all that shines / and know that happiness has no habit of sitting on the throne. / Under the golden crown hides the one made of thorns, and not / even in the legends you will not find a truly happy king. / You will see true happiness only in the corner of your home, / in serious work, following humanely the path that God has ordained for you¹⁷.

With these verses, Nikola I tried to instil family and moral values in his daughters.

From an early age, Jelena showed a penchant for painting, in which her sisters helped her, and court teachers tried to develop this talent for art. She had a well-developed gift for music and a sense of beauty in general: she played, and danced, was witty and poetically gifted. In the house

of poets and rulers, she learned something more than basic education because she was often at court in the company of the actors, poets and teachers that her father, a Parisian student, gathered together in the then cultural capital of Montenegro¹⁸.

As had been customary for the older daughters of Nikola I, Jelena was sent to school in Russia at the age of ten, to the *Imperial Society for the Education of Girls from Good Families* at the Monastery of the Holy Mother of God in Smolny (St. Petersburg), often called the *Smolny Educational Institute*. The institute was intended for the education of princesses and girls selected from respectable families in Europe. Jelena's sisters Maria and Stana were also there at that time, and all of them were educated at the expense of their baptismal godfather, the Russian Tsar Alexander II. (Pic. 1)

The work schedule at the institute was very intense and strenuous for Jelena, comprising seven hours of activity. Discipline and obedience were the fundamental principles of the school, and religion guarded schoolgirls «against the

¹⁷ Ducci, *Jelena Savojska: zivot pun ljubavi*, cit., pp. 35-36.

¹⁸ V. Latkovic, *Charobna kraljica Jelena Savojska* [The Magic Queen Elena of Savoy], Beograd, Vesmark & Beoknjiga, 2008, pp. 34-36.

sins that lurked in the outside world»¹⁹. Numerous hard lectures were at the level of a solid European education. The schoolgirls studied foreign languages, exact sciences, natural sciences, music, painting, dance and handicrafts. «Good behaviour» was obligatory teaching subject. Special attention was paid to the fundamental formation of consciousness, intellectual education, women's affairs and beautiful appearance, which determined morality itself²⁰. Given her fondness for music and painting, she was allowed to have a piano and an easel in her room.

She was particularly affected by the death of her sister Marija, who died in Jelena's arms when she was only 14 years old. In Smolny, Jelena did not shine with knowledge or diligence, but she showed a great gift for art - music, painting and literature²¹. The beauties of Russia, the architecture of Moscow's castles, churches and mausoleums, attracted her eyes. She was fascinated by paintings and sculptures of great Russian artists²² and she liked the city of St. Petersburg very much. The bibliographic data of the institute do not provide any information about her progress in learning, other than mentioning that almost all the girls from the Petrovic family encountered difficulties at the beginning in mastering the Russian language, but that this was not the case with Jelena²³. Even before coming to the institute, Elena spoke Russian, French and some Italian. She wrote verses in Russian, and published poems in French in the local literary magazine *Nadalia*²⁴. When she was 15, she sent verses of poem with the title *Vision* to the Russian literary magazine «Nedelja» (rus. Воскресенье, eng. Sunday) under the pseudonym *Blue butterfly*. She described the Hermitage Museum to her father Nikola I and her brother Danilo in letters, to their delight sending verses by Alexander Pushkin and other poets. These letters contain her very interesting views and thoughts on love and on the inferior position of women in relation to men, in the family, towards the husband, their exclusion from public life, emphasizing the poor position of women in Montenegro and further afield²⁵.

After returning to Cetinje in 1890, Elena continued to complete her education at court, but also to teach her sisters and brothers. To Petar and Vjera, the youngest of Nikola I's children, Jelena read fairy tales, practiced

¹⁹ Ducci, *Jelena Savojska: zivot pun ljubavi*, cit., p. 55.

²⁰ Latkovic, *Charobna kraljica Jelena Savojska*, cit., p. 37.

²¹ M. Jovicevic, A. Kapichic, T. Jovic, *Dvor kralja Nikole* [The court of King Nikola], Cetinje, Narodni Muzej Cetinje, 1999, p. 165.

²² Latkovic, *Charobna kraljica Jelena Savojska*, cit., p. 39.

²³ Barneschi, *Jelena Savojska*, cit., pp. 106-107.

²⁴ Ducci, *Jelena Savojska: zivot pun ljubavi*, cit., p. 83.

²⁵ *Ibid.*, pp. 61-65.



Pic. 2. Princess Jelena, Prince Petar and Princess Vjera, Cetinje, 1894, from M. Jovicevic, *Vjenčanja na crnogorskom dvoru* [Weddings at the Montenegrin court], Cetinje, Muzeji Cetinje, 1988, p. 67

playing the piano or played with them in the court park. She tried to teach them to speak foreign languages, to read as much as possible, to learn natural sciences and respect the court teachers, to be moderate and to fulfil their obligations on time²⁶. (Pic. 2)

In that phase of her life she read, wrote and participated a lot in public life. By connecting what she acquired in St. Petersburg with her origins, during the period 1891-1896, Jelena's personality combining strong Mediterranean characteristics and traditional femininity was completely formed²⁷. Elena was active in her personal and social life. She continued to develop her expressive talent for painting, and the mausoleum of the founder of the Petrovic Njegos dynasty (Danilo I Petrovic Njegos, 1670-1735) on the hill Orlov krs [Eagle's Rock] at Cetinje was built in October 1896 on Elenas' draft.

2. Marrying Vittorio Emanuele: Elena presented to the Italians

The marriage between Jelena and Vittorio Emanuele (1869-1947) was arranged, as was normal at the time, but turned out to be a very happy one. Vittorio Emanuele was the only son of Umberto I of Savoy (1844-1900) and Margherita of Savoy (1851-1926). His parents were cousins as were his grandparents. Probably as a consequence of this consanguinity, Vittorio Emanuele was weak at birth, with abnormally short legs, atrophied leg muscles and deformed feet that caused him pain and discomfort during his childhood and required him to wear orthopaedic aids for years. His physical defects, particularly shaming for a king at the time, played a role in his shyness and

²⁶ Latkovic, *Charobna kraljica Jelena Savojska*, cit., pp. 40-44.

²⁷ Siccardi, *Jelena, nezaboravljena kraljica*, cit., p. 27.

reserved character. Vittorio received a full princely education and enjoyed military life, in spite of his physical shortcomings²⁸.

He refused an arranged wedding, but his mother and the Premier Crispi managed to arrange his meetings with Jelena of Montenegro in St. Petersburg and in Venice without his being aware of their machinations. They were looking for a healthy bride and the small principality of Montenegro appealed to Crispi who harboured colonial ambitions towards the Balkans. The tsar Nicolas II and Nikola Petrović favoured the union. The two young royals met and really fell in love²⁹.

Vittorio Emanuele travelled to Montenegro, where he spent quite a few days, in a rural, simple and happy atmosphere that appealed to his character. In the palace of Cetinje he and Jelena were officially engaged. A few months later, on 24 October 1896, the young couple married in Rome, after Jelena's conversion from the Greek-Orthodox to the Catholic faith. She converted to Catholicism, saying that she was firmly convinced that God is best served through love of neighbour³⁰. Her name was changed to the Italian Elena.

The choice of her as a bride took many by surprise. The Savoy dynasty was one of the oldest in Europe and was connected to other royal houses, from the Valois and Bourbon to the Habsburg, through a series of marriages. The choice of the daughter of the Grand Duke of a small territory in the Balkans (who went on to become King in 1910) was considered diminishing for the Savoy. Members of the royal family and courtiers had words of contempt for Elena, who was described as «la bergère» [the shepherdess] by the duchess Elena of Aosta. Vittorio Emanuele's cousin Amedeo of Aosta, a very tall man, coined the contemptuous nickname «Curtatone and Montanara» [Shorty and Mountain woman] for the couple, from the name of two famous battles lost in the first independence war against Austria during the Italian Risorgimento (1848). The wedding was strongly disapproved of by those who backed the alliance with Austria and the Berlin Triple Alliance (1882). Some journals described Elena as beautiful, but shy and a little clumsy; others as pretty, rather than beautiful as was claimed elsewhere³¹.

²⁸ M. Bondioli Osio, *La giovinezza di Vittorio Emanuele III nei documenti dell'Archivio Osio*, Milano, Simonelli, 1998.

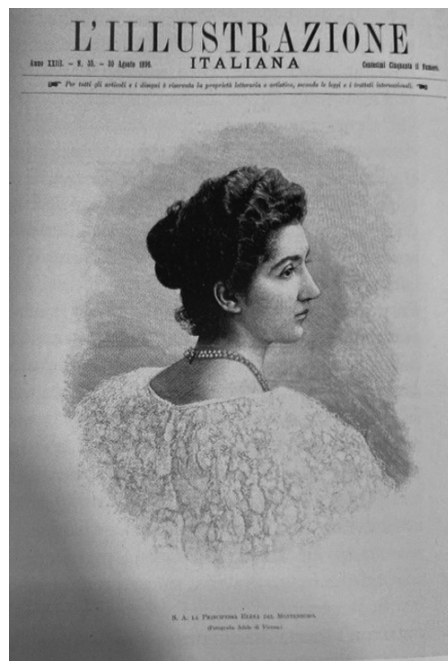
²⁹ L. Regolo, *Jelena. Tutto il racconto della regina Elena di Savoia*, Milano, Simonelli, 2002, pp. 106-136.

³⁰ Jovicevic, *Vjenčanja na crnogorskom dvoru*, cit., p. 166.

³¹ A. Spinosa, *Vittorio Emanuele III. L'astuzia di un re*, Milano, Arnoldo Mondadori, 1990, pp. 62-67. F. Le Moal, *Vittorio Emanuele III*, Gorizia, Leg, 2016 (French ed. *Victor-Emmanuel III*, Paris, Petrin, 2015), pp. 76-77.



Pic. 3. «La Tribuna illustrata», 23 Aug. 1896, n. 34



Pic. 4. «L'Illustrazione Italiana», 30 Aug. 1896, from Pascucci, *Elena di Savoia nell'arte e per l'arte*, cit., p. 44

To allow Italians to get to know their future queen, her photographs were published in newspapers³². «La Tribuna» dedicated its cover to her, on the occasion of her engagement. (Pic. 3)

The same image was printed by «L'Illustrazione italiana». Both drawings referred to a photograph of Elena taken by an Austrian photographer. Elena's body was turned and her face was seen in profile. «L'Illustrazione Italiana» which tended to use very sober photographs printed a typical engraving in black and white, whereas the more popular «La Tribuna illustrata» opted for a rather idealized and romantic drawing. (Pic. 4)

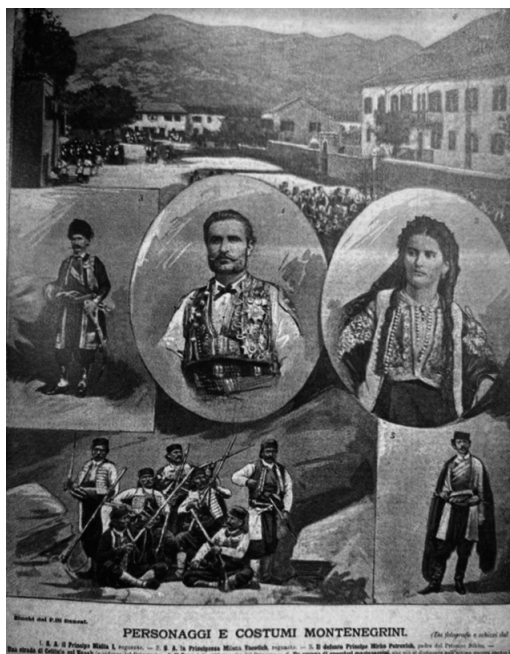
«La Tribuna illustrata» went on to represent Vittorio Emanuele at Cetinje palace, being presented to the Montenegrin court. He is bowing slightly before his future parents-in-law and is depicted as much taller than he was. Elena's profile is much idealized, as in the previous cover. (Pic. 5)

The beautiful and colourful costumes typical of Montenegrin culture were also represented in the last page of the issue which depicted Prince Nikola and

³² Pascucci, *Elena di Savoia nell'arte*, cit., pp. 42-46.



Pic. 5. «La Tribuna illustrata», 30 Aug. 1896, n. 35



Pic. 6. «La Tribuna illustrata», 30 Aug. 1896, n. 35

his wife Milena alongside a Montenegrin warrior. The reputation of the people of Montenegro as fierce warriors was underlined. (Pic. 6)

The «Corriere della Sera» carefully pointed out that Elena always dressed in a modern fashion, and that in her family it was only her brother who usually wore Montenegrin traditional dress³³. This was a false statement, since her family certainly used to wear traditional costume as well as Western dress, and indicates a certain uneasiness about Elena's Montenegrin origins. (Pic. 7)

In 1899 the «Corriere della Sera» described the life of the Prince and his wife as simple, sober and very intimate and full of affection. She had no children at the time, but the newspaper already pointed out her great love of children, as well as her love of hunting, a passion she had acquired in Montenegro. The article hence underlined both the sweet character of Elena and her «virile» attitude, being brave in the face of peril and physical pain. In this, the heritage of the people of Montenegro was highlighted³⁴. The same message was conveyed

³³ *La principessa Elena*, CS [«Corriere della Sera»], 24 Aug. 1896, p. 1.

³⁴ *I principi di Napoli*, CS, 25-26 March 1899, p. 2.



Pic. 7. Young Jelena wearing traditional Montenegrin dress and the traditional women's headdress of Crna Gora (Black Mountain), from Barneschi, *Elena di Savoia*, cit., p. 98



Pic. 8. «La Tribuna illustrata», 3 Dec. 1899, n. 49



Pic. 9. «La Tribuna illustrata», 8 Oct. 1896, n. 42



Pic. 10. «La Tribuna illustrata», 1 Nov. 1896, n. 44

by a cover of «La Tribuna Illustrata» of that year, depicting a hunting scene with the royal family, including Elena, on the left, and her sister Xenia, both holding a rifle. Her hunting skill and love for fishing are remembered by her biographers³⁵. (Pic. 8)

«L'Illustrazione italiana» dedicated its cover to Elena a week before the wedding. She was photographed standing, partially turned away from the viewer with a serious and thin face, in a commonly used official pose, far removed from that of the hunting woman³⁶. «La Tribuna illustrata» put a drawing of the royal couple (based on a photo) on the front cover, with the prince standing and looking slightly to the side and Elena sitting and looking at the camera, with a rather sad expression. The posture was formal, with the wife seated, a common pose that had the advantage of disguising the great difference in height between the two, the prince being 1.53/1.54 m tall and Elena being 1.77/1.80 m tall. The bride's height would have diminished the image of the prince, stressing his already embarrassing shortness. (Pic. 9)

The cover of 1 November 1896, dedicated to the wedding banquet, depicted Vittorio Emanuele as taller and slightly bending for a toast, so that he looked as tall as Elena. (Pic. 10)

The young royals spent the first years of their marriage in Florence and then in Naples as a happy couple. Both Elena and Vittorio Emanuele did not like the sumptuous life of parties and high society. They preferred a quiet life, protecting their privacy, and shared the same interests and love of travel and nature. Elena enjoyed personally cooking for her husband, something which was considered decidedly odd and not at all fitting for a princess (although Elena continued to do this as queen). Elena's ladies-in-waiting were reduced to four. The number of guests at court were also drastically reduced. The aristocracy criticized the couple's reservedness and lack of taste for high society. The aristocracy looked at Elena as she were inferior and sometime with contempt. She was compared with her mother-in-law Margherita, who had a traditional regal attitude, supported the arts and culture, and held a weekly salon in the Quirinale Palace with intellectuals and aristocrats. A *charmante* woman, Margherita had fascinated the republican poet Giosuè Carducci³⁷.

³⁵ Elena went fishing every day in her holidays in St. Anna di Valdieri Fishing was her favourite hobby and she spent much money on it. She used to fish also in her exile in Egypt. Siccardi, *Elena, la regina mai dimenticata*, cit., pp. 155-161; R. Barneschi, *Elena di Savoia*, cit., pp. 243-249. Also the princess Jolanda became a very good hunter, *ibid.*, p. 162.

³⁶ «L'Illustrazione italiana», 8 Oct. 1896, n. 42, <http://periodici.librari.beniculturali.it/visualizzatore.aspx?anno=1896&ID_testata=1&ID_periodico=11027> (last access: 14.12.20).

³⁷ G. Papasogli, *La Regina Elena*, Milano, Massimo, 1964, p. 90; Le Moal, *Vittorio Emanuele III*, cit., pp. 125-126; Spinosa, *Vittorio Emanuele III*, cit., p. 99.

3. *Elena as Queen: a caring mother*

On 29 July 1900 Umberto I was shot in Monza by the anarchist Gaetano Bresci, while Vittorio Emanuele and Elena were on a cruise around Greece, visiting archaeological sites. Becoming Queen of Italy, Elena was more in the public eye. Her desperate cry when in front of Umberto's corpse was recorded. The Queen Mother Margherita left the right kneeling-stool to her, hence recognizing her as the new Queen³⁸. «La Domenica del Corriere» devoted its back cover to the scene, the front cover being reserved for the assassinated King. The illustrator Beltrame depicted the royal family's moment of sorrow and the despair of the crying wife and daughter-in-law, carefully representing the real scene as it was described in the article of the «Corriere della Sera»³⁹. Umberto had always been kind to Elena, and so was Margherita, who despite not approving of Elena and Vittorio Emanuele's reserved and sober lifestyle, stepped back as Queen Mother. (Pic. 11)

The young King and Queen now had to live in Rome in the magnificent Quirinale Palace. However, they chose to occupy a few modestly decorated rooms in one of the pavilions. They also continued to share the same bedroom, another habit considered unsuitable for royalty. The court personnel was drastically reduced. All pomp and ostentation was abolished. Elena dressed elegantly but in a simple style, far removed from the magnificent toilettes, jewels and famous long strings of pearls of the Queen Mother (who was known as the Queen of Pearls)⁴⁰.

In 1911 they abandoned the Quirinale as their home and moved to Villa Ada, renamed Villa Savoia, surrounded by a vast park in the northern part of Rome. The King travelled by car to work at the Quirinale every morning and afternoon. His familial life was protected and kept private. The court balls and parties, already reduced, were now abandoned⁴¹. The famous journalist Giuseppe Prezzolini wrote in 1908 that Vittorio Emanuele was a «petty-bourgeois» king, who lived entirely without splendour⁴².

The couple's first daughter, Jolanda, was born 10 months after the coronation. Four more children were born later: Mafalda, Umberto, Giovanna, and Francesca. The royal family used to spend their holidays in the royal palace of Racconigi, a historic property of the Savoy family not far from Turin, with a medieval castle that had been transformed into an elegant villa, surrounded by a huge park, where the royals could go hunting and fishing. It was said

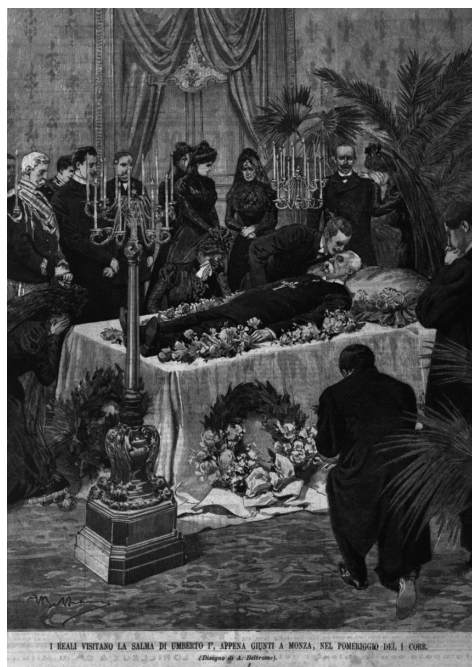
³⁸ *L'arrivo dei Reali a Monza*, CS, 2 Aug. 1900, p. 3; P. Cesarini, *Elena, la moglie del re*, Firenze, La voce, 1953, pp. 82-83.

³⁹ *I Sovrani a Monza e il loro incontro con la Regina Madre*, CS, 2 Aug. 1900, p. 3.

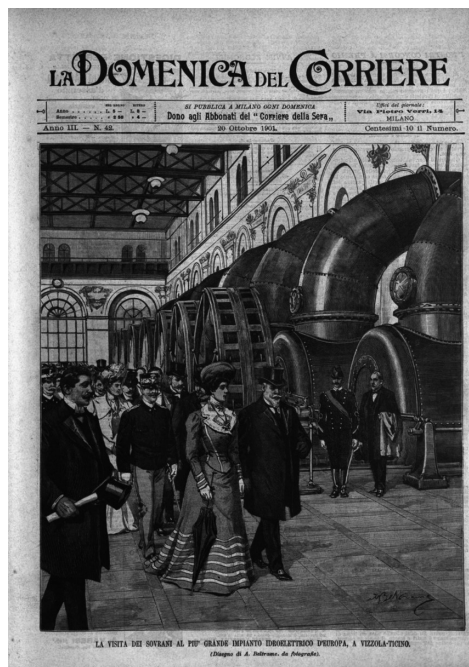
⁴⁰ Siccardi, *Elena, la regina mai dimenticata*, cit., pp. 75-77; Pascucci, *Elena di Savoia nell'arte*, cit., pp. 61-72.

⁴¹ Le Moal, *Vittorio Emanuele III*, cit., pp. 124-126.

⁴² Spinosa, *Vittorio Emanuele III*, cit., p. 99.



Pic. 11. «La Domenica del Corriere», 12 Aug. 1900, n. 32



Pic. 12. «La Domenica del Corriere», 20 Oct. 1901, n. 42

it reminded Elena of the mountains of Montenegro. In 1906 «La Domenica del Corriere» dedicated the back cover to the queen fishing, with her children playing nearby. The children lived in close contact with nature in the huge parks of Villa Savoia and Racconigi Castle, where, from an early age, they learnt to ride horses.

After the coronation, the «Corriere della Sera» dedicated more articles to the Queen. These focused on her charitable attitude towards the poor and particularly children, and her visits to hospitals, children's hospitals and welfare institutes. Her good heart, her sweetness and genuine care for the sick and the poor and for all children were always underlined, alongside her sober life and modesty.

As for Elena's image on national magazine covers, in 1901 she appeared on the front cover of «La Domenica del Corriere», while visiting a big hydro-electrical system near Milan with the King. The Queen here was simply accompanying the monarch on one of his official duties, and the attention was not on her alone. The drawing was done taking a photo as model, as declared, but certainly the fact that the Queen was at the front allowed to disguise the couple's great difference in height, by playing with the perspective. (Pic. 12)

The Queen did not appear alone on the cover of «La Domenica del Corriere» until 1908, when she was depicted visiting a medical facility dedicated to poor mothers in Rome, without prior warning. When she saw how sick the baby was, she gave both some money and advice on hygiene to the poor mother. When the woman realized she was talking to the Queen, and not a rich benefactor, she fainted, as reported by the «Corriere della Sera»⁴³. Beltrame shows the shock on the poor woman's face, and depicts the Queen as if she wanted to touch the child. The doctor is starting to move the child towards her, but the frame is stopped in advance of the act of holding or caressing the child, which would not be considered regal by many. So, Beltrami showed the Queen's interest, without her touching the baby, an act not described by the article. (Pic. 13)

«La Tribuna Illustrata», however, dedicated more attention to the Queen than «La Domenica del Corriere». Its covers no longer depicted her as a passionate and brave hunter, as in 1899, but rather as a good-hearted woman. Three covers showed her caring for children. In the first, in 1900, some poor barefoot girls were caught inside the park of the Royal Palace of Capodimonte near Naples. The Queen and her lady-in-waiting are dressed in black following Umberto's death. Rather than reproaching the girls, one of whom kneels down, the smiling queen caresses the one at the front. (Pic. 14)

Similarly, in the second cover, a year later, the royal couple is in the Royal Park of Racconigi in Piedmont, and Elena smiles and leans forward to caress a poor baby. The period of mourning has finished and the Queen, who had become a mother a few months previously, is dressed in white. Her bending posture and the position of the King, a few steps behind her, once again allows the height difference between the two to be disguised. (Pic. 15)

The third cover refers to the monarchs' visit to a school for the blind on the occasion of the Congress of the Blind in Rome in 1906. Elena's compassion and personal empathy is shown by the inclination of her head and her sweet smile. Again, the King is slightly behind her but clearly represented as much taller than he was. (Pic. 16)

Two other covers were dedicated to Elena's charitable attitude towards sick children. In the first, she is depicted comforting a little sick child in the infirmary of the Orphanage of Milan in 1901. She is touching him with both hands. Yet again, this posture both shows her compassion and hides her height – her head being on the same level as the other people, including the King. In these covers Elena was shown often actually touching and caressing poor children. (Pic. 17)

⁴³ *La Regina Elena pel bimbo d'una povera donna*, CS, 29 Feb. 1908, p. 3.



Pic. 13. «La Domenica del Corriere», 8-15 Mar. 1908, n. 10



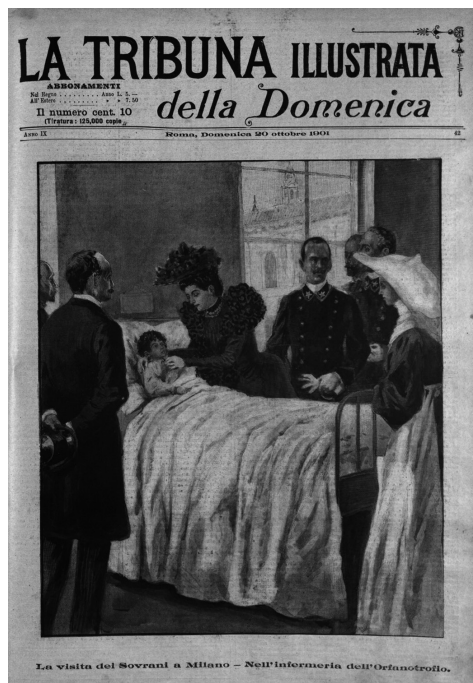
Pic. 14. «La Tribuna Illustrata», 11 Nov. 1900, n. 45



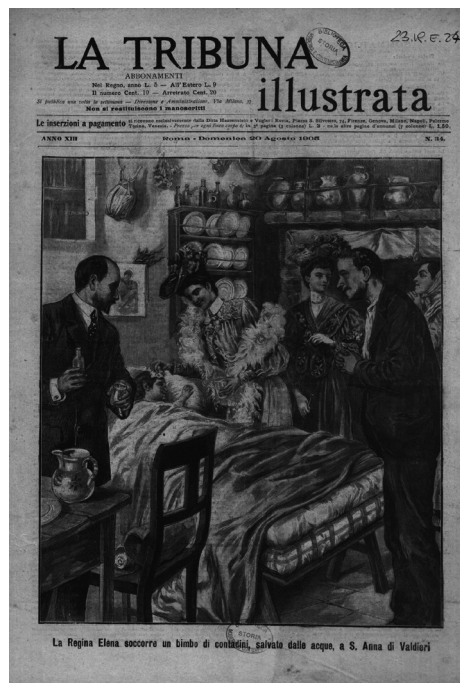
Pic. 15. «La Tribuna Illustrata», 8 Sept. 1901, n. 36



Pic. 16. «La Tribuna Illustrata», 16 Dec. 1906, n. 50



Pic. 17. «La Tribuna Illustrata», 20 Oct. 1901, n. 42



Pic. 18. «La Tribuna Illustrata», 20 Aug. 1905, n. 34

In the second one, the illustrator shows an episode that was also reported by other journals⁴⁴. As soon as Elena had heard about a little child who had fallen into a canal and nearly died in St. Anna di Valdieri, a small town in Piedmont where she was on holiday in one of the Savoy residences, she rushed to the child's humble home with her doctor to treat her. In this cover, she dominates the scene, wiping the child's fevered brow and giving her the medicine the doctor has prepared, with a sweet smile. The poor parents' hands are clasped in a gesture of anguish and prayer, but their smiles show that the danger has passed. In these covers Elena has the same posture, bending to the left from the viewer's perspective, as if the illustrators used the same model. (Pic. 18)

Moreover, in 1906 the journal dedicated its cover to the Queen visiting poor mothers and children in Naples, following the eruption of Vesuvius in April. Elena here is holding a small child, and is surrounded by poor children, either barefoot or wearing adult shoes or slippers. She is dressed simply in black with an ermine stole she used to wear and looks like a caring upper middle-class

⁴⁴ *Una sorpresa della Regina*, CS, 3 Aug. 1905, p. 3.

woman. The act of holding a poor child was certainly new for an Italian Queen: «La Tribuna illustrata», being more popular than «La Domenica del Corriere», dared to show Elena in this uncommon act and chose to represent the Queen touching poor children, hence conveying immediately the idea of her closeness to low classes. (Pic. 19)

Elena looked after her children personally, following her own mother's example. While talking with the writer Sofia Bisi Albini, a famous journalist and moderate feminist, Elena described herself as a mother: «I am no wiser or cleverer than other mothers, but I really love children, all children. Children and I always understand each other»⁴⁵.

Elena's interest in pedagogical methods is confirmed by an article in the «Corriere della Sera» in 1909, that reported on the unexpected visit paid by the Queen to Montessori's *Casa dei Bambini* in the poor quarter of S.Lorenzo in Rome. «She wanted to meet Dr. Maria Montessori, who with such love and zeal manages the school, and caressed many children» before leaving⁴⁶.

Elena's interest in her own children and in childhood in general was so deep that she used to talk about infancy with the wives of politicians and military Pic. ures, who sometimes criticized her for being boring⁴⁷. Her interest in childhood did not meet the expectations of the Italian royal court. The slight vein of contempt for «la bergère» and her middle-class way of life still existed among the aristocracy. This persistence is demonstrated by the defence of Elena in one issue of «La donna», a magazine for upper- and middle-class women that opposed political emancipation but backed a moderate rise for women in society, presenting women who succeeded in their work or in public life. «La donna» dedicated its final issue of 1908 to Elena. The journal admitted that Elena faced a difficult comparison with the «italianissima» Margherita, who



Pic. 19. «La Tribuna Illustrata», 29 aprile 1906, n. 17

⁴⁵ P. Cesarini, *Elena, la moglie del re*, Firenze, La voce, 1953, p. 99.

⁴⁶ *Visite inaspettate della Regina Elena*, CS, 29 Jun. 1909, p. 3.

⁴⁷ A. Lombroso, *Elena di Montenegro regina d'Italia*, Firenze, La fiamma fedele e di Fiamme gialle d'Italia, 1934, pp. 90-100.

was «twice Savoy»: «the monarchists paid homage to her with no enthusiasm». However, in spite of being a cultivated woman, she did not set herself up to be in competition with Margherita. She was brave in her choice of being herself: sweet, simple, spontaneous and good-hearted⁴⁸.

The article implied that in following a traditional model as a wife and mother, Elena was perceived as Italian, referring to her Montenegrin origins as being responsible for the courage, fierceness and love of hunting, that made her a «chaste Diana». Elena was described as being far removed from the suffragette movement, that held rather «useless and wordy» conferences (clearly referring to the National Congress of Italian Women, which took place in Rome in 1908, amid controversy and debate⁴⁹). In fact, the Congress saw the presence of Montessori and many of its topics, such as the necessity of supporting poor mothers and their children, and of protecting poor and sick children, were certainly shared by Elena, so this argument in the article is ideological. The defence of Elena, in fact, was clearly constructed, praising her reassuring image of a sweet wife and mother, who in spite of her cleverness and culture, preferred to step back and leave the King to perform the political duties, dedicating herself to the poor.

Another article was devoted to the Queen's holiday in St. Anna di Valdieri, where she lived with her family and no courtiers in the small palace, being «the real queen of her own family»⁵⁰ (the middle class definition of a good wife).

«La donna» presented Elena as a Slavic beauty, who could easily become a Latin beauty, with her black hair, brown eyes, strong body, and her deeply maternal attitude. Cultivated but modest, easy going and sweet, caring and dedicated to her family, she embodied the ideal Italian wife and mother. Her Montenegrin background was presented as a strength: it was a poor country but with fierce people. People loved her, because she was close to the people. In this way, the journal was very clever in turning Elena's image into a positive, without criticising Margherita.

In conclusion, this issue of «La donna» testifies to the attempt to defend Elena from the criticism and faint support of the aristocratic classes. As a public figure, she had not received much attention from the «Domenica del Corriere» or «L'Illustrazione italiana»; the «Corriere della Sera» stressed her loving and charitable character, as did the more popular «La Tribuna illustrata», which dedicated some covers to her. Her image as a caring mother was being constructed, but the real turning point would be the terrible earthquake that occurred just a few days after the issue of «La donna».

⁴⁸ G. Ferruggia, *Elena regina nostra*, «La donna», 25 Dec. 1908, pp. 20-21.

⁴⁹ T. Pironi, *L'educazione della "donna nuova" nel primo Congresso nazionale delle donne italiane (1908)*, in C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, SEI, 2008, pp. 249-281.

⁵⁰ S.M. *la regina Elena a Valdieri*, «La donna», 25 Dec. 1908, pp. 22-23.

4. Messina earthquake: the turning point

On 28 December 1908 one of the 20th century's most catastrophic seismic events occurred: an earthquake measuring 7.1 on the moment magnitude scale that devastated Reggio Calabria and razed the Sicilian city of Messina⁵¹. The total number of victims was estimated at around 120,000.

On 30 December 1908 the King and the Queen arrived first at Reggio Calabria and then at Messina. The banks of Messina's harbour were damaged by the tsunami that had followed the earthquake, making the rescue operations even more difficult. When the first survivors, wounded and in a state of shock, came on board to be assisted, Elena's maid fainted. The Queen, however, kept her composure and began to help personally. Elena then boarded the Russian cruiser *Slava*, among the first to intervene at the disaster scene, asking to take many of the seriously wounded to Naples. Elena, who spoke perfect Russian, implored the Commander, who eventually agreed and thus saved many lives⁵².

Vittorio Emanuele travelled along the coast and throughout the surroundings, to personally check the situation. Elena organized the emergency work to help the wounded and the children. The Navy ship *Regina Elena* provided first aid to the little orphans, while the other ships tended the wounded and assisted surviving families. The Queen ordered that all Messina hotels should be given over to tending the wounded. She herself went round, helping through words and actions. She even pulled a little girl from the rubble, holding a collapsed beam up with her shoulder. She wore a simple dark dress and a sailor's hat, as reported by the journalists and witnesses⁵³.

It was in precisely that dress and hat that she was represented on the cover of «La Domenica del Corriere», under the heading: «Queen Elena, modestly dressed, tends to the wounded with great compassion among the ruins of the previously rich and delightful Messina». The Queen holds an injured woman's hand and strokes her head, while people are crying and two soldiers are removing a corpse. It is a terrible scene, but the Queen is kneeling down and encouraging the poor woman who lies on the ground. (Pic. 20)

«L'Illustrazione italiana» also showed Elena, in the same dress and hat, holding the hand of an injured man being taken on board. As said, this magazine never published drawings, but photos or engravings from photos. (Pic. 21)

⁵¹ *Ora di strazio e di morte*, CS, 30 Dec. 1908, p. 1. Cfr. G. Boatti, *La terra trema. Messina 28 dicembre 1908: i trenta secondi che cambiarono l'Italia, non gli italiani*, Milano, A. Mondadori, 2004.

⁵² *L'invocazione angosciata della Regina all'aiuto fraterno*, CS, 1 Jan. 1901, p. 1. N. Dini. *L'angelo di carità. La Regina Elena a Messina*, Messina, Di Nicolò, 2010, p. 32.

⁵³ Papasogli, *La Regina Elena*, cit., p. 121; R. Barneschi, *Elena di Savoia: storia e segreti di un matrimonio reale*, Milano, Rusconi, 1986, pp. 181-182; Siccardi, *Elena, la regina mai dimenticata*, cit., pp. 100-105; Pascucci, *Elena di Savoia nell'arte*, cit., pp. 90-97.



Pic. 20. «La Domenica del Corriere», 10-17 Jan. 1909, n. 2, back cover

In fact, she did not just supervise, she herself was on the front line, helping doctors. Her medical competence and her humble dedication were much admired. News reported that Elena:

was not crowned with diamonds and wearing satin and laces, she was wrapped up in cloth aprons, her sleeves rolled up to her elbow, she was tireless among hundreds of men, women and injured and weeping children. She never stopped washing, disinfecting, bandaging, from morning to night, skilled, patient, humble, finding for everyone an affectionate word, an encouraging help, a caress⁵⁴.

The «Corriere della Sera» reported the words of a Russian officer, who described her deeds with deep admiration and named her a «holy sister of charity». He stressed that she dressed simply and helped tirelessly with her words, smiling and acting like a nurse. He drew attention to her moral strength: twice he saw her in tears in the

face of the tragedy, but rapidly regaining control of herself and carrying on⁵⁵.

For three days she went on helping the sick and poor people. Her courage and tireless commitment elicited the admiration of everybody, in Italy and in Europe⁵⁶. From then onwards, she was referred to as a «sister of charity» or an «angel of charity», «merciful», «charitable».

«La Tribuna Illustrata» called her «Our Queen, our foremost sister of charity» and showed her helping the doctors as a nurse on the deck of the *Regina Elena*. She is dressed in cloth aprons, her sleeves rolled up to her elbow, as described above. (Pic. 22)

A postcard was printed, with the Queen dressed in the uniform of the Red Cross, her hair simply arranged, with the crown above her. The postcard bore the title «Her Majesty Queen Elena, Angel of Charity». She was referred to as a «good fairy of charity» (a more secular definition), «more beautiful in her simple workwoman's dress». She became an icon of simplicity and dedication to suffering people. Postcards, like stamps and coins, travelled around the

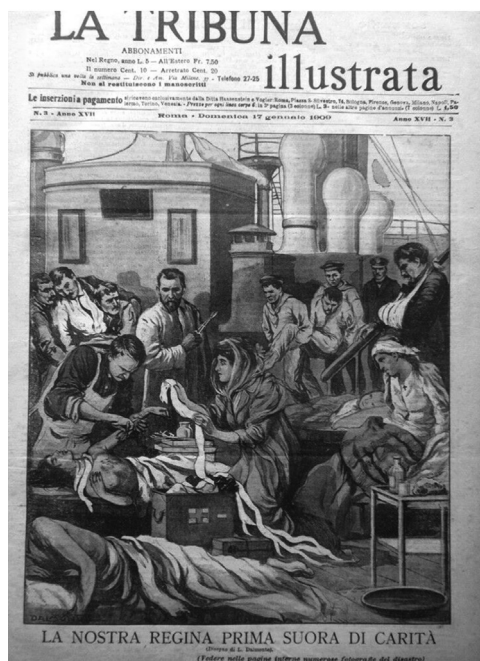
⁵⁴ Dini, *L'angelo di carità*, cit., p. 34.

⁵⁵ *La regina suora di carità*, CS, 2 Jan. 1909, p. 3.

⁵⁶ See CS, 9 Jan. 1909, p. 2; 10 Jan. 1909, p. 2; 18 Jan. 1909, p. 2; 24 Jan. 1909, p. 2; 27 Jan. 1909, p. 6.



Pic. 21. *La regina Elena regina di pietà*, «L'Illustrazione italiana», 17 Jan. 1909, from Pascucci, *Elena di Savoia nell'arte*, cit., p. 91



Pic. 22. «La Tribuna Illustrata», 17 Jan. 1909, n. 3



Pic. 23. Postcard. Queen Elena, Angel of charity, from Dini, *L'Angelo di Carità*, cit., p. 31



Pic. 24. «La Domenica del Corriere», 12-19 Jun. 1910, n. 24

country and abroad, conveying an iconic message. Elena was definitively the Queen of the Italian people. (Pic. 23)

In April the monarchs complained about the enduring unsatisfactory condition of the houses that hosted the poor people of Messina and Reggio Calabria⁵⁷. At the end of May 1910 they visited Messina and Reggio Calabria. Everywhere they were cheered and welcomed with enthusiasm. «La Domenica del Corriere» put the Queen on the cover again, showing her smiling, surrounded by cheering children offering her flowers. As usual in Beltrame's drawings, the scene was resembling the «Corriere della Sera» journalist's description, particularly the Queen's dress (with two red carnations) and hat were exactly as reported⁵⁸. (Pic. 24)

Until this time, the «Corriere della Sera» had devoted few articles to the

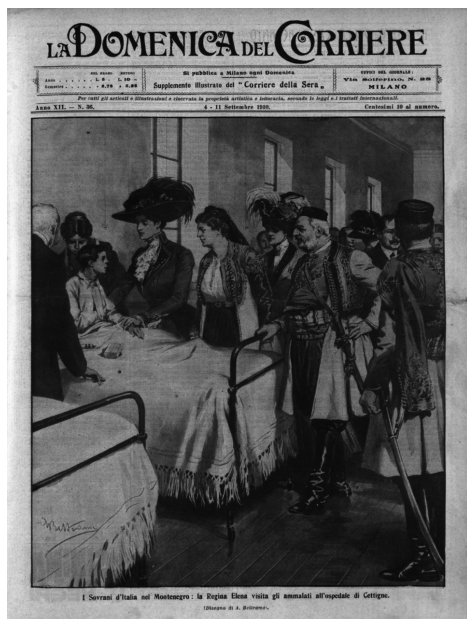
Queen (2.5 per year after the coronation, excluding the articles announcing the births of the royal babies), but in 1909 the number of articles about Elena jumped to 19, at a rate of 1.5 every month. This was the highest number between 1900 and 1952 and testifies to the strong impact the Queen's behaviour in Messina had on the public.

5. Elena as «sister of charity»

In 1910 the «Corriere della Sera» published 6 articles about the Queen, followed by only 2 in 1911, and 7 in 1912. The subjects of these were her visits to paediatric units, and her effective support for poor people, especially mothers and children. The poor of Messina were never forgotten by the Queen. She also took care of sick veterans of the Libyan war. Her royalty was definitively identified with her maternal spirit, that she directed towards all Italians. But she did not forget her mother country. She personally financed the establishment of a new surgical ward in Cetinje when the royal couple visited Montenegro in

⁵⁷ *Le impressioni dei Sovrani a Messina secondo un ufficiale*, CS, 14 Apr. 1909, p. 2.

⁵⁸ *Le visite dei Sovrani a Messina e a Reggio Calabria*, CS, 31 May 1910, pp. 1-2.



Pic. 25. «La Domenica del Corriere», 4-11 Sept. 1910, n. 36



Pic. 26. «La Domenica del Corriere», 6-13 Jul. 1913, n. 27

1910. She paid a visit to Cetinje hospital and stopped to talk to the sick children. Beltrame in «La Domenica del Corriere» shows her holding a boy's hand with one hand while also touching him with the other. Her parents are wearing Montenegrin traditional dress. In this case, Beltrame was using his imagination, since the «Corriere della Sera» only mentioned this visit, without providing details⁵⁹. The magazine had reported two days before that Milena wore the traditional dress. The royal faces and costumes were carefully reproduced, surely thanks to Beltrame's own photos archives. Beltrame presumed Elena caressed the sick boy, as she used to do. After the earthquake, also Beltrame showed her touching people: people got used to that. In fact, in August 1911 «La Domenica del Corriere» put the Queen on the back cover, showing her on the beach near Pisa, smiling and stroking the head of one of the poor and weak children who had been sent to the sea to recover their health. (Pic. 25)

In 1913 the Queen, while on holiday in San Rossore, was depicted tending to a workman, who had injured his foot falling off his bicycle. This was certainly a most unusual action for a queen and testified to both her skill as a nurse and her kind heart. (Pic. 26)

⁵⁹ *Il Re d'Italia a caccia*, CR, 26 Aug. 1910, p. 2.



Pic. 27. «La Domenica del Corriere», 25 Sept. 1932, n. 39

Twenty years later, another cover by Beltrame showed a very similar scene that took place while she was on holiday at St. Anna di Valdieri. A peasant has fallen from a cableway and broken his leg. The Queen bandages it before sending the man on to hospital. These were only two of the various occasions on which Elena stopped to personally help the sick or injured. Her biographies recollect these facts and her deep interest in medicine: her knowledge was empirical and came from Montenegrin popular uses⁶⁰. She used to rush to people in need of medical care. In court register there are 52 cases of babies born with the Queen help in the St. Anna di Valdieri and Rossore. During her holidays she assisted peasant women as midwife, after having helped her mother's deliveries in Cetinje. She had different medical cases, where she kept different tools⁶¹. In both Pic. 26 and 27 Beltrame

correctly showed one of her cases she used to take with her. (Pic. 27)

In 1913 and 1914 two articles were published by the «Corriere della Sera» about her, this time highlighting her culture and her interest in archaeology. In fact, she prompted and personally followed the excavation of Roman ruins on the royal estate of Castel Porziano, near Rome, cataloguing the findings herself⁶².

The image of the good-hearted Queen soon returned during the war, overshadowing that of the cultivated woman. In 1915 the «Corriere della Sera», dedicated 14 articles to her, the largest number since 1909. Indeed, already in January 1915, after another (much smaller) earthquake in Avezzano, Elena immediately sent a train loaded with medicines, supplies, and blankets⁶³. Italy joined the war on May 24. The following night, the King departed Rome and spent the war years with the troops at the battlefield on the North Eastern boundary.

⁶⁰ Barneschi, *Elena di Savoia*, cit., pp. 240-242.

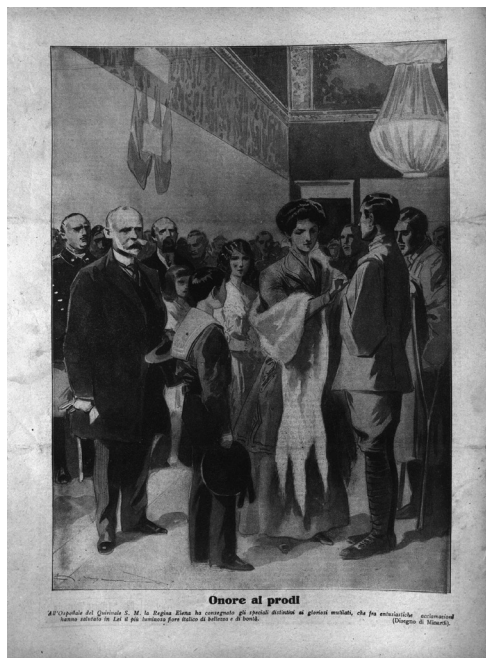
⁶¹ Siccardi, *Elena, la regina mai dimenticata*, cit., pp. 184-185.

⁶² CS, 18 Nov. 1913; CS, 22 Jan. 1914. On Elena's interest in archaeology see Pascucci, *Elena di Savoia nell'arte*, cit., pp. 173-185.

⁶³ CS, 19 Jan. 1915.



Pic. 28. «La Tribuna Illustrata», 7-14 Jan. 1917, n. 1



Pic. 29. «La Tribuna Illustrata», 26 Nov.-3 Dec. 1916, n. 48, back cover

Elena visited invalid and injured soldiers in military hospitals. In July she visited the battlefield and was deeply moved. She converted a floor of the Quirinale Palace into a military hospital and devoted herself to it⁶⁴. She donated money to children who were war refugees, and to poor children with working mothers and soldier fathers. The French journal «Le Pic. aro» praised Elena, remembering her charitable actions in Messina and connecting them to her present behaviour. An «admirable spouse and mother, she shied away from politics and court. She carries on her tradition of simplicity and love. But just as she faced dangers in Messina [...] she now knows how to cry for war sorrows and how to praise the sacrifice of soldiers»⁶⁵. In spite of the rhetoric and laudatory tone of this and other articles, the image of the good-hearted, modest and caring mother was now definitively attached to Elena. «La Tribuna illustrata» dedicated a front and back cover to her charitable activities for soldiers in the Quirinale Palace. In both cases, her face was idealized. (Pic. 28, 29)

⁶⁴ *L'Ospedale del Quirinale e l'opera della Regina Elena*, CS, 9 Aug. 1915, p. 2.

⁶⁵ *Ammirazione francese per le Regine d'Italia*, CS, 24 Jul. 1915, p. 3.



Pic. 30. «La Domenica del Corriere», 5-12 May 1918

Beltrame, in «La Domenica de Corriere», depicted Elena in a more realistic way, as usual, dressed as a Red Cross nurse and personally taking care of young war refugee children. (Pic. 30)

The iconic image of Elena as a «sister of charity» re-emerged, this time fully dressed in white and with her head covered. A manifesto with a drawing by Carlo Grimaldi was distributed in 1916. Elena's hands are clasped, thus making her resemble even more the image of a nun. (Pic. 31)

The same year, the very same image was copied and reproduced on the back cover of the journal «La settimana illustrata». (Pic. 32)

6. Elena and Fascism

After the war, the attention the Queen received in the media decreased dramatically, as if her role had been frozen in her charitable interventions in disasters. In the 13 years between 1919 and 1932 the «Corriere della Sera» devoted on average only one article per year to her, covering her visits to hospitals and orphanages. She was defined again as a «merciful nurse of charity» during the Great War⁶⁶, with a motherly heart, and unlimited charity⁶⁷.

During the Fascist era, it was the image of il Duce which had to overpower all others, including the monarchs. Elena appeared on the covers of «Domenica del Corriere» only on official occasions. «L'Illustrazione italiana» put a photograph of the Queen on the cover on 8 December 1935, under the title: «Elena donating her wedding ring». In keeping with this journal's style, she was not captured in the act of donating the ring, but as Queen⁶⁸.

⁶⁶ *Il Monumento alla Madre Italiana inaugurato dai Sovrani in Santa Croce*, CS, 5 Nov. 1926, p. 2.

⁶⁷ *Un profilo della Regina Elena tracciato da Le Pic. aro*, CS, 18 dec. 1929, p. 27.

⁶⁸ <<https://www.myitalianbazaar.com/contact.php/prodotto/3370/sm-la-regina-elena-1934>> (last access: 9.12.20).



Pic. 31. Manifesto by Carlo Grimaldi, 1916, <https://www.europeana.eu/it/item/9200199/BibliographicResource_3000052896155_source> (last access: 6.01.2021)



Pic. 32. «La settimana illustrata», 30 Apr. 1916, back cover, <<https://www.mynumi.net/en/1916-la-settimana-illustrata-n-17-battaglia-valle-di-ledro-regina-elena-dama-croce-rossa-ri-vista-originale>> (last access: 4.01.2021)

The «Corriere della Sera» reported Elena's words to Mussolini on this official occasion: «My ring represents what is dearest to me, because it reminds me of the day I had the good fortune of becoming Italian». The article highlighted how she was the best representative of Italianness and an example to Italians, implying that in spite of her non-Italian origins, she embodied the true Italian spirit. Clearly it was the Fascist propaganda speaking. In his contemporaneous biography, Lumbroso defined her as a «sublime symbol» of «Italy itself»⁶⁹.

The Queen had become the model woman, a model which fitted well with the Fascist idea of motherhood, since she embodied the honest mother of the ancient Roman tradition, who stepped back and did not interfere with politics and dedicated herself to her family. Having five children, she could also represent a prolific mother.

In 1935 the Queen's medical abilities drew attention to her anew, even if this was used to pay tribute to the regime at the same time. The «Corriere della Sera»

⁶⁹ Lumbroso, *Elena di Montenegro regina d'Italia*, cit., p. 166.



Pic. 33. «La Domenica del Corriere», 18 Apr. 1937, n. 16



Pic. 34. Photograph of the ceremony of the Golden Rose being awarded to the Queen. Archivio fotografico per riscoprire il Regno d'Italia e la Monarchia, <<http://foto.italiareale.it/cerimonia-di-consegna-della-rosa-doro-alla-regina-elena-roma>> (last access: 4.01.2021)

dedicated 10 articles to her. She had in fact introduced in Italy the so-called Bulgarian treatment for encephalitis lethargica, a viral pandemic of unknown cause that spread just before, during and after the Spanish flu with devastating effects, killing more than 5 million people. Elena knew of a treatment involving belladonna, which was used in Bulgaria. She used her own money to import the medicine and arranged that a ward in the Rome General hospital, named after her, as well as in many other Italian hospitals, was reserved for these patients. Her dedication to this cure led to her being awarded a degree in Medicine *honoris causa* by the University of Rome in 1941⁷⁰.

This remarkable recognition did not receive a cover: the popular magazines preferred to show, once again, her image of charitable women being awarded. On 5 April 1937 Pope Pius XI awarded the Queen the Golden Rose, in recognition of her private and public virtues. The «Corriere della Sera», reported the fact on page 3. The event was overshadowed by il Duce awarding military aviators, which occupied the first page with Mussolini featuring in three photographs. Her papal reward was relegated to the third page, there were no photographs of Elena: her personal value and Christian charity should not cast any shadow over the military and political propaganda of il Duce. However, the more popular «Domenica del Corriere» dedicated its cover to her. As usual, Beltrame depicted the event in a realistic way, faithfully reproducing a photograph of the monarchs walking solemnly in the Quirinale to the chapel, followed by Prince

⁷⁰ P. Mazzarello, *L'erba della regina: storia di un decotto miracoloso*, Torino, Bollati Boringhieri, 2013 (Bulgarian edition: *Bilkata na kralicata: istorijata na edna čudotvorna otvara*, Sofija, Kibea, 2014).

Umberto and Princess Maria Francesca. (Pic. 33, 34)

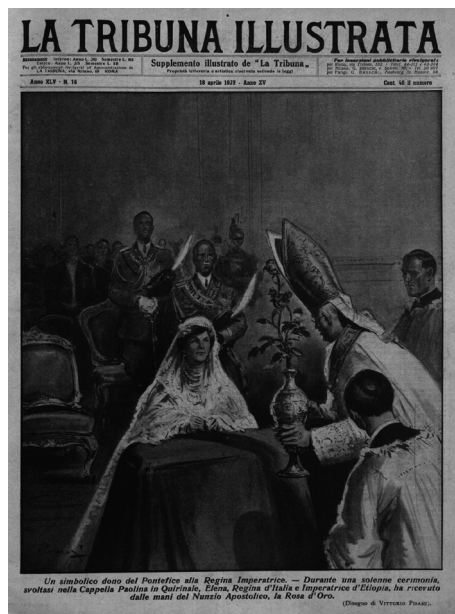
In this case Beltrame was also faithful in his representation of the monarchs' size, correctly showing the difference in height between the two, and the tall Pictures of the prince and princess who had inherited their mother's tall physique. This adherence to reality could underline Elena's greatness but also diminish the King's image, something that was in line with Mussolini's distance from the King in the years of the alliance with Hitler⁷¹.

«La Tribuna Illustrata» concentrated its attention on the Queen, who was depicted kneeling down before receiving the precious papal gift⁷². (Pic. 35)

Elena did not intervene in political affairs. She never openly supported Mussolini, unlike the Queen Mother, nor did she have any contact with antifascists, as Maria Josè, Prince Umberto's wife, did. With Italy entering the war, Elena continued her humanitarian tasks and visits, with her usual kindness and commitment⁷³.

The number of articles that the «Corriere della Sera» devoted to the Queen, which had gone down to one a year, if that, jumped to six in 1941: these were all about her good deeds for the wounded, the sick, and the poor. Three hospitals were opened in her name; she opened a canteen for the poor in the park of Villa Savoia, and nearly every day she went to greet and talk to the poor people who came to eat. Her «simple royalty and her goodness» had earned her enormous popularity⁷⁴. But her intense charitable activities were used by the newspaper to prop up a discourse that aimed to show that the monarchy supported il Duce.

After the armistice of September 8th, the royal family left Rome for Brindisi. On 9 May 1946, in a desperate attempt to save the monarchy, Vittorio Emanuele III abdicated in favour of his son Umberto. On 2 June 1946 Italy voted in a referendum, with 52% voting in favour of establishing a republic.



Pic. 35. «La Tribuna Illustrata», 18 Apr. 1937, n. 16

⁷¹ Le Moal, *Vittorio Emanuele III*, cit., pp. 310-339.

⁷² On these two covers, see Pascucci, *Elena di Savoia nell'arte*, cit., pp. 108-110.

⁷³ Papasògli, *La Regina Elena*, cit., pp. 216-217.

⁷⁴ *Casa Savoia esaltata da un giornale svizzero*, CS, 14 marzo 1941, p. 1

Conclusions

The Italian monarchy formally ended on 12 June 1946. King Farouk of Egypt gave hospitality to Vittorio Emanuele and Elena, who remained in Alexandria. Vittorio Emanuele died a year later. Elena developed cancer and died in Montpellier in France on 28 November 1952.

«La Tribuna illustrata» and «La Domenica del Corriere» showed Elena, now 80, in bed, with her son and other family members around her, when she had just been operated on and it looked like she was better and the «catastrophic» news of her life being in danger was denied, as «La Domenica del Corriere» reported. The illustrator of «Domenica del Corriere» was now the famous Walter Molino, whose style was realistic. (Pic. 36, 37)

But more than two weeks later she died, with her sister Xenia and the faithful lady in waiting by her. «La Tribuna illustrata» chose to show her alone, «in exile like her parents before her» looking out of the hospital window, «her eyes towards Italy». The final image of her was of an Italian woman. (Pic. 38)

The magazine «Epoca», targeted to middle class families, dedicated its cover to Elena, with a photograph taken in 1934. She is represented without a crown, wearing her usual stole and a pearl necklace like a bourgeois woman, rather than a queen. The cover title is «The Queen who was always Mum», using the word «mamma», very warm and colloquial, in place of the more formal «madre» [mother] to underline her affection. (Pic. 39)

The good memories Elena left behind can be read about in the articles the «Corriere della Sera» published after her death. The first was entitled: «A simple life, a model mother»⁷⁵: a short biography of her highlighted how she had managed, with her kindness and charity, to overcome the doubts and bewilderment that had accompanied the news of a royal engagement to an obscure princess from a small mountainous country. Orio Vergani, a well-known journalist, wrote the article «Her Palace was her family», in which he affirmed that her image would be forever that of a loving spouse and mother. The popular feeling had changed from respect and devotion to royalty, to genuine affection for the beautiful young mother of five children. She became the «Mother of Italy»⁷⁶. Her Montenegrin origins were forgotten, and she became a true Italian queen, close to the people.

The following day, another article dedicated to her youth pointed out on the other hand, the importance of Montenegro in her life, and how she had suffered at her family's exile and the lack of Italian intervention in favour of her country's freedom. This article also highlighted her sorrow at having had to donate her wedding ring (an act much exploited by the regime). She was faithful to Montenegrin traditions: taking charge of the home, educating the

⁷⁵ *Una vita semplice, una madre esemplare*, CS, 28 Nov.1952, p. 1.

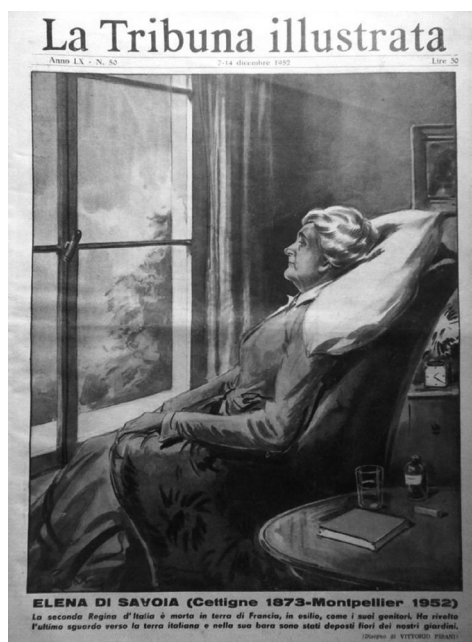
⁷⁶ O. Vergani, *La sua Reggia fu la famiglia*, CS, 29 Nov.1952, p. 2.



Pic. 36. «La Tribuna Illustrata», 16-23 Nov. 1952, n. 47



Pic. 37. «La Domenica del Corriere», 23 Nov. 1952, n. 47



Pic. 38. «La Tribuna Illustrata», 7-14 Dec. 1952, n. 50



Pic. 39. «Epoca», 13 Dec. 1952, <<http://www.petitesondes.net/Epoca/1952-114-p.pdf>> (last access: 4.01.2021)



Pic. 40. 2013, Queen Elena, Montenegro stamp, <<http://www.postacg.me/Arhiva-vijesti/Rezultati-Konkursa-za-izbor-motiva-pri-godnih-postanskih-maraka>> (last access: 6.01.2021)

children, teaching them their prayers, guiding them towards their duties and work. Her intelligence was recognized, as well as her origins⁷⁷.

An Italian mother in one description; an intelligent woman who was faithful to her origins in the other. The second article depicts Elena as she was, the first as she was so often presented. By being herself (and therefore by being faithful to a model of life she had learned in her own family and country) and by being faithful to her origins, Elena became, paradoxically, the icon of the Italian mother. Montenegro's traditions of care for the family and for nature were in accordance with the Italian female model, not with the model of a Queen of Savoy. Elena became an icon of Italianness by transforming her image from that of a Montenegrin princess to that of an Italian wife and mother.

Her intellectual talents, her mastery of languages, and love for music, poetry, archaeology, and medicine, were always overshadowed by her maternal side (with few exceptions relating to her medical talent).

Whereas her official portraits and photographs with their formal poses and serious expressions only differed from the usual ones in Elena's less luxurious elegance in comparison with the Queen Mother, the cover of middle-class magazines conveyed a more dynamic image of a caring woman. Her Montenegrin origins, which carried with them the exotic aura of a warrior people of the mountains, were present in the initial «virile» hunting scene and in the early period following her betrothal and wedding, but were erased by her kindness. She was always depicted in the act of touching or being about to touch children and sick people, holding small children, stroking them. She holds suffering people's hands, she smiles, she leans forward towards the sick and the children. This image of a smiling woman touching her poor subjects reduced the distance between royalty and the people and made clear that she was a caring person. Her image was idealized in the engagement period and in some covers of «La Tribuna illustrata», but Beltrame's covers were always realistic. Faced with the powerful image of Queen Margherita, regal, «twice Italian», she became Italian embodying the (stereotype) model of perfect wife

⁷⁷ *Elena giovinetta*, CS, 30 Nov. 1952, p. 3.

and mother, but adding her personal virtues. Her maternal spirit, modesty and good heart appealed to low middle class more than to the aristocracy. The covers here examined contributed to the building and diffusion of Elena's positive image.

During Fascism, the media here used gave much less attention to the Queen, remembering her in her official duties and inserting her in a propaganda discourse. Maternity was traditionally considered the natural destiny of a woman, by Catholic, by Socialists and by Fascists⁷⁸ and Elena embodied a model of universal motherhood, caring for all children, for the poor and the sick.

Following her death, her memory did not disappear, particularly in Messina, where in 1960 a statue of her was erected.

Already in 1953, the first biography of her appeared, followed by others. Elena's biographies (sometime hagiographies) have titles that echo the myth of her: The King's

Wife, Queen of the Humble, The Never-forgotten Queen, A Life of Love, the Angel of Charity⁷⁹. By contrast, the three initial biographies, two written for her wedding and one during the Fascist era, all remembered her Montenegrin origins in their title⁸⁰, an element which disappeared in the subsequent biographies.

During the period in which Montenegro was part of socialist Yugoslavia (from 1945) until its regained independence (2006), Elena has been officially forgotten, but after that began a reaffirmation of her picture and work. In recent decades several studies, poems and fairy tale⁸¹ have been written about



Pic. 41. 2002, Queen Elena, Italian stamp, 50th anniversary of Queen Elena's death, <<https://www.ibolli.it/php/em-italia-2914-Ritratto%20della%20regina%20Elena%20di%20Savoia.php>> (last access: 6.01.2021)

⁷⁸ P. Wilson, *Women in Twentieth-Century Italy*, Basingstoke, Palgrave MacMillan, 2010, pp. 4-42, pp. 61-95; V. De Grazia, *How Fascism Ruled Women. Italy. 1922-1945*, Berkeley, University of California Press, 1992.

⁷⁹ Cesarini, *Elena, la moglie del re*, cit.; C. Nicovich, *Elena di Savoia, regina degli umili*, Milano, M. Gastaldi, 1959; Papasògli, *La Regina Elena*, cit.; R. Baschera, *Una veggente in Casa Savoia*, Milano, Armenia, 1985; Barneschi, *Elena di Savoia*, cit.; E. D'Assia, *Il lampadario di cristallo*, Milano, Longanesi, 1992; Siccardi, *Elena, la regina mai dimenticata*, cit.; D. Ducci, *Elena di Savoia: una vita d'amore*, Bari, Ixia, 1998; Regolo, *Jelena*, cit.; Dini, *L'angelo di carità*, cit.

⁸⁰ D. Ambruosi, *Elena Petrovich ovvero l'astro del Montenegro*, Bitonto, N. Garofalo, 1896; G. Marcotti, *Il Montenegro e le sue donne*, Milano, Treves, 1900; Lumbroso, *Elena di Montenegro regina d'Italia*, cit.

⁸¹ V. Latkovic, *Charobna kraljica Jelena Savojska*, cit., poem *Kraljica Jelena Savojska* [The Queen Elena of Savoy], pp. 108-109, and fairy tale *Bajka o Jeleni* [A Fairy Tale about Elena], pp. 127-146.

Elena in Montenegro, she was sung in a guslar song⁸², even a theatrical drama was written about her⁸³. In 2013, following its independence, Montenegro printed a stamp in her honour⁸⁴. In 2002 the Italian state had issued a stamp for Elena, on the occasion of the 50th anniversary of her death. The two stamps present the identical picture of a beautiful young Elena, and the same title: Elena of Savoy: the Italian Queen for Italy, a Montenegrin and Italian Queen for Montenegro. (Pic. 40, 41)

⁸² Text by D. Crvenko, played and sung by Dj Koprivica, *Jelena* [Elena], 2012, <https://www.youtube.com/watch?v=sv2h2uAEywg&feature=emb_logo> (last access: 08.09.2020).

⁸³ O. Nenezić, *Drame* [Dramas], Nikšić, Nikšićko pozorište, 2006, *Jelena Savojska* [Elena of Savoy], pp. 3-81. The play was written in 2000, and performed in the theater under the name *Dvorska drama* [Court drama].

⁸⁴ In 2012 a competition for new postage stamps was announced, and in 2013 the one with the image of Queen Elena was one of the chosen. In 2012, it was 60 years since the death of Queen Elena, so that the postage stamp was in her honour.

Perceptions and implementations of Froebelian pedagogy in the Greek education. A transcultural analysis

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ABSTRACT: Transcultural approaches become more and more popular in historiography of education shifting research interest from national entrenchments to spatial and cultural unities. Considering diffusion of pedagogical ideas as cultural transfer, this paper aims at studying how Froebelian pedagogy was perceived and implemented in the context of the different environments of Greek education, under the Ottoman rule and the nation state, during the end of the 19th century. It also seeks to demonstrate how different actors constructed their own adaptation of pedagogical knowledge, prioritizing the social over the pedagogical dimension of the educational process. Taking into account historical data of the Greek case, the paper also discusses hybridization and indigenization of pedagogical ideas as cross-cultural exchanges.

EET/TEE KEYWORDS: Greek education; History of pedagogy; Transcultural approach; Froebelian Pedagogy; Kindergarten; Greece; XIXth Century.

Transnational and Transcultural Approaches in Historiography of Education

Transnational history of education consists a relatively recent trend in historiography of education. It refers to a historical narrative that transcends intellectual borders constructed in contexts of national navel-gazing, paving

the way for the study of the movement of influential actors and texts¹, educational ideas, technologies, and institutions across national boundaries². While transnational perspectives in historical educational research require a multidisciplinary approach, using central concepts and approaches of comparative education, theoretical and analytic tools from cultural transfer studies and historical sociology³, is, at its core, a mainly historical work. It deals with archival elements, adopts historical narrative structures and requires empirical intercrossing⁴. As aptly pointed out by Mayer, transnational approaches «provide theoretical and methodological concepts with which to venture in new directions, to explore new research questions and innovative research constellations, or to use new source material»⁵.

Roldán Vera and Fuchs, having studied the ever-increasing research adopting transnational perspectives in the field of history of education, suggest its classification into three broad theoretical approaches⁶. The first one concerns education on display through the lens of Marxism. «World System Theory» is a version of dependency theories. In a global social system, it discerns between metropolises and satellites countries, a structural relationship, which reflects the priorities and interests of the center and subjugate the peripheral areas through internalization of a mentality and practice of dependency⁷. Education manifests itself in the dependent countries as a technology of borrowing or imitation, which, essentially, perpetuate underdevelopment. The second theoretical approach derives from new institutionalism macro-level theory, that has been largely applied to analyzing social change. This is «World Culture» theory, which provides tools for understanding the expansion of schooling worldwide as a path dependence driven by a shared cultural assumption on «the logic of science and the myth of progress»⁸. From a perspective of «World Culture» theory, during the “long” modernist period, models of socially constructed

¹ S. Grek *et alii*, *Travel, Translation, and Governing in Education: The Role of Swedish Actors in the Shaping of the European Education Space*, «Paedagogica Historica», 30 July 2020, pp. 1-11.

² A. Iriye, P.-Y. Saunier (edd.), *The Palgrave Dictionary of Transnational History*, Basingstoke New York, Palgrave Macmillan, 2009.

³ J. Mahoney, D. Rueschemeyer (edd.), *Comparative Historical Analysis in the Social Sciences*, Cambridge, U.K.-New York, Cambridge University Press, 2003.

⁴ M. Werner, B. Zimmermann, *Beyond Comparison: Histoire Croisée and the Challenge of Reflexivity*, «History and Theory», vol. 45, n. 1, 2006, p. 30.

⁵ Chr. Mayer, *The Transnational and Transcultural: Approaches to Studying the Circulation and Transfer of Educational Knowledge*, in E. Fuchs, Eug. Roldán Vera (edd.), *The Transnational in the History of Education*, Cham, Springer International Publishing, 2019, p. 64.

⁶ Roldán Vera, Fuchs, *Introduction: The Transnational in the History of Education*, in *The Transnational in the History of Education*, cit., pp. 19-29.

⁷ N. Christofis, *World-Systems Theory*, in S. Romaniuk, M. Thapa, P. Marton (edd.), *The Palgrave Encyclopedia of Global Security Studies*, Cham, Springer International Publishing, 2019, pp. 1-7.

⁸ St. Carney, J. Rapleye, I. Silova, *Between Faith and Science: World Culture Theory and Comparative Education*, «Comparative Education Review», vol. 56, n. 3, 2012, p. 368.

and embedded social action have emerged, that are related to a convergence of schooling worldwide⁹. Roldán Vera and Fuchs consider as a result of adopting this theory in the historical-comparative approach of education the emergence of «the grammar of schooling»¹⁰, valid worldwide uniform structures and rules on education that determine institutional continuity and change in educational field¹¹. Finally, a third broad theoretical framework related to transnational approaches can be considered Luhmann's theory of «World Society»¹². This theory proposes social systems to be approached as systems of communication, which reproduce or reform themselves. Because of permeability of communication boundaries, modern society should be considered a world society, where social systems and subsystems receive stimuli from their global environment. What creates functionally differentiated social systems depends on openness, interpenetration or structural coupling of the systems. As for pedagogical science, critical is considered Luhmann's concept of «externalization», a documentation of the necessity for the combination of historical and comparative methods when studying educational phenomena, that «facilitates an understanding of processes of the construction of international reference horizons, of world views and interpretations of history, exemplary reform models, or glorified figures from the educational tradition»¹³.

Closely related to theoretical traditions are analytic tools that are considered the most appropriate to interpret cultural transfers, long term consequences, path dependencies, ideological transformations through transnational history of education. Roldán Vera and Fuchs glean some of them¹⁴ coming from the perspective of comparative historical analysis in social sciences¹⁵. The «cultural transfer» approach is considered to better meet the objectives of the present study, as it seeks to «analyze transfers and the multiple relationships and intertwining between and within geographic and cultural spaces»¹⁶.

Cultural transfer shifts research interest from the national entrenchments to spatial and cultural unities, which are far from being treated as landlocked and autonomous distinctive groups. On the contrary, requirements and settings overseeing cultural reception are into focus together with the question on which

⁹ E. Fuchs, *Transnational Perspectives in Historical Educational Research*, «Comparative», vol. 22, n. 1, 2012, pp. 7-14.

¹⁰ D. Tyack, W. Tobin, *The 'Grammar' of Schooling: Why Has It Been so Hard to Change?*, «American Educational Research Journal», vol. 31, n. 3, 1994, pp. 453-479.

¹¹ Roldán Vera, Fuchs, *Introduction*, cit., p. 21.

¹² *Ibid.*, p. 22.

¹³ G. Steiner-Khamsi (ed.), *The Global Politics of Educational Borrowing and Lending*, New York, Teachers College Press, 2004, p. 32.

¹⁴ These include network analysis tools, the lending and borrowing process, the «cultural transfer» approach, tools for concept and/or language analysis, the norm-cycle approach. For a detailed treatment, see Roldán Vera, Fuchs, *Introduction*, cit., pp. 24-29.

¹⁵ Mahoney, Rueschemeyer, *Comparative Historical Analysis in the Social Sciences*, cit., pp. 177-301.

¹⁶ Mayer, *The Transnational and Transcultural*, cit., p. 56.

ideas or practices are chosen for exchange and how they have been incorporated within the frame of the receptive culture. In this frame, transfer should be considered as a product of a mutual interaction between groups. In the same vein, it invites us to put aside theories of dependency, or approaches on donor and recipient cultures. One basic assumption of cultural transfer is that societies change through processes of «an unspecified crossing or intersection»¹⁷. These processes can be set in motion by mechanisms of transmission and persons or groups operating as mediators. Thus, cultural transfer analysis is conducted through a frequently invoked distinction into three steps¹⁸. The first one examines ways and reasons of interaction, while the second step focuses on the mechanisms of transmission (translation, pedagogy, imitation, etc.) and on the intermediaries that played crucial role decontextualizing transferred practices or concepts into the receiving culture. The third step of analysis concerns to apprehend the transformation of the transferred concepts and ideas in local contexts. The main task of the researcher at this stage is to describe the result produced as a process of recontextualization. Here, are detected phenomena that are more multidimensional and complex compared with the process of the “diffusion of ideas”. Recontextualization seeks to draw some historical – comparative implications, such as indigenization, hybridity of educational concepts and practices, enculturation, or transnational educational spaces¹⁹. Mayer considers this stage to be of particular importance and she commends reasonably that «processes of intermediating and perception are followed by the transformation of the appropriated cultural element into something that appears as an original of the perceiving culture under consideration»²⁰.

Transnational Perspectives on Diffusion of Pedagogical Knowledge

Many examples could be retrieved from literature on the history of education, in which pedagogical knowledge is studied as a transnational phenomenon. In such a vein, there are many cases putting emphasis on processes of translation, hybridity, appropriation and indigenization of pedagogical knowledge in local settings²¹. Translation typically marks the renewal of pedagogical knowledge and educational practices. It is considered a mechanism of transmission which involves a mediation and, at the same time, a process of cultural selection reflecting commitments and priorities²². Hybridization or indigenization of an

¹⁷ Werner and Zimmermann, *Beyond Comparison*, cit., p. 31.

¹⁸ Mayer, *The Transnational and Transcultural*, cit., pp. 60-61.

¹⁹ Roldán Vera, Fuchs, *Introduction*, cit., pp. 17-18.

²⁰ Mayer, *The Transnational and Transcultural*, cit., p. 61.

²¹ Roldán Vera, Fuchs, *Introduction*, cit., p. 18.

²² Grek *et alii*, *Travel, Translation, and Governing in Education*, cit.

original model seems to be a key aspect of educational borrowing²³. While an idea, a discourse or a reason travels, it is subject to modifications and changes; since it is not directly recruited, but interpreted and renegotiated in the light of the new cultural settings in which it is transferred²⁴. Appropriation from a foucauldian perspective is considered as discourse that emerges in regulating the subject within modernity²⁵. Depaepe signifies the concept through the lens of historical – comparative analysis of education, noticing the relation between cultural transfer and acquisition of learning and the unavoidable interaction of cultural traditions in the process of modernization²⁶.

An illustration of the evolution of transnational perspective on diffusion of pedagogical knowledge would highlight the diffusion of Kindergarten institution as a central topic of numerous researches. Kindergarten seems to be a global institution, in respect to which, processes of translation, hybridity and appropriation have been widely applied. As an institution, Kindergarten has its origins in Friedrich Froebel's theory on physical development of the child. Froebelian legacy was the reason for Kindergarten's global diffusion, so it is considered that we are legitimized to talk about a movement, due to the several ways the institution travelled internationally, its wide dispersion and the large number of intellectuals who, on a global scale, drew their educational practice from Froebelian pedagogy²⁷.

From its cradle already, the German-speaking space, Kindergarten institution takes various forms, in relation to an eclecticism reserved to Froebel and his theory by his descendants. The original codified Froebelian system, so radical and liberal in its conception that it came to the forefront of conservative criticism after the 1848 revolution in the Germanic states of Central Europe, was initially formed into a more conventional version by his student, Baroness von Marenholtz-

²³ A. Nóvoa, M. Lawn, *Fabricating Europe: the formation of an education space*, Dordrecht, Boston, Kluwer Academic Publishers, 2002, p. 81.

²⁴ El. Klerides, *Comparing Identities in Dissimilar Spaces and Times*, in L. Wikander, Chr. Gustafsson, U. Riis (edd.), *Enlightenment, Creativity and Education*, Rotterdam, Sense Publishers, 2012, pp. 193-208.

²⁵ G. Kontogiannopoulou-Polydorides, *Social control, power relationships and cultural appropriation in education*, «Comparative and International Education Review», vol. 8, 2007, pp. 35-58.

²⁶ «Rather than alienation or uprooting, everyday educational practice should probably refer more to appropriation, which in any case leaves scope for adjustments and fleshing-out at the local level. Civilization never appears from a single centre but results from multiple influences and practices, which, regardless of the general trends they harbour, time and again give rise to differentiated results in the short and long term. So, to quote Jürgen Schriewer (2004), there is no internationalization without indigenization». See M. Depaepe, *Writing Histories of Congolese Colonial and Post-Colonial Education: A Historiographical View from Belgium*, in B. Bagchi, E. Fuchs, K. Rousmaniere (edd.), *Connecting Histories of Education: Transnational and Cross-Cultural Exchanges in (Post)Colonial Education*, New York, Oxford, Berghahn Books, 2014, p. 51.

²⁷ R. Wollons, *Kindergarten*, in A. Iriye, P. Saunier (edd.), *The Palgrave Dictionary of Transnational History*, Basingstoke, New York, Palgrave Macmillan, 2009.

Bulow. Baroness gave Kindergarten characteristics of schooling involving children middle and upper social strata and a political socialization towards nation building. In this way she contributed to a first wave of dissemination of Froebelian pedagogy, which was quite far from natural child development. One second wave of diffusion of Kindergarten took place on the basis of the request for returning to Froebel's authentic pedagogical conception, which focused on play, family education and countervailing function. But even in that case, which pioneered Henriette Schrader-Breymann, elements of Froebelian theory, such as pedagogical material, were gradually put on the sidelines. Instead, Pestalozzi's approach to motherly love and free play, acquaintance with the environment through the senses, and school garden were preferred. The third wave of dissemination, related to the Reform Pedagogy movement, highlighted the importance of free play and imagination, but systematically criticized both the romantic-metaphysical nature of Froebel's thinking and the formalization of some of his practices²⁸. From the above, it is clear that transformation had already occurred in the cradle of Froebelian pedagogy. Therefore, studying the diffusion of the kindergarten is a complex task, as it happens in three consecutive waves, which represent different versions of Froebelian thought.

Such a complex reality highlight the data discussed by two collective volumes examining Kindergarten from a transnational perspective²⁹. In the publication edited by Roberta Wollons³⁰, phenomena like hybridity and appropriation are detected in a process of cultural transfer, such as that which took place rapidly throughout the universe, with the spread of Kindergarten in the late 19th and early 20th centuries. The collective volume opens a wide discussion on transformation of Kindergarten idea and practices. Recontextualization took place in correlation with the ways of travelling (direct contact with the ideas, contact with ideas and practices already transformed, contact with ideas and practices twice transformed), appropriation was present in any implementation effort outside the West, while in some cases Kindergarten is considered to cultivate national identity or to preserve it³¹.

May, Nawrotzki and Prochner are the editors of a collective volume that provides additional data and theoretical tools on transnational perspective on Kindergarten and Froebelian Pedagogy³². In this case, private or public sector

²⁸ S. Chatzistefanidou, *History of Preschool Education: Anthropological and Pedagogical Views – Upbringing Practices – Care and Education Institutions, From the First Societies to the 19th Century* (in Greek), Thessaloniki, Kyriakidis Brothers, 2008, pp. 324-344.

²⁹ For a relevant literature review, see Wollons, *Kindergarten*, cit.; D. Caroli, *Day Nurseries in Europe in the Nineteenth and Twentieth Centuries: The Challenge of the Transnational Approach*, in Fuchs, Roldán Vera (edd.), *The Transnational in the History of Education: Concepts and Perspectives*, cit., pp. 69-100.

³⁰ R.L. Wollons (ed.), *Kindergartens and Cultures: The Global Diffusion of an Idea*, New Haven, Yale University Press, 2000.

³¹ Wollons, *Kindergarten*, cit., p. 619.

³² H. May, Kr. Nawrotzki, L.W. Prochner (edd.), *Kindergarten Narratives on Froebelian*

seems to determine the rejection or the adoption of traditional educational practices, respectively, and to involve free play, or, on the contrary, adult-directed play. Kindergarten is considered an institution, which as it spreads worldwide is directly related to transformation and appropriation of Froebelian pedagogy. In fact, to such an extent, it is suggested that «Froebel's ideas can be seen as indigenous or ahistorical and 'natural' to every situation in which they are positioned; they can be de- and re-contextualized»³³.

Research aims, methodology and questions

Based on the above, our study aims to investigate transition of pedagogical knowledge in the Greek settings as a cultural transfer, associated both with the specific emerging cultural context and with the specific context of its reception³⁴. In particular, we attempt to study how Froebelian pedagogy – manifested itself in waves and not as a comprehensive pedagogic model – was accepted and ultimately implemented at the late 19th century in the two different networks of Greek education: under the Ottoman rule and under the nation Greek state. We take advantage of concepts and tools emanated from transnational history of education. The three-steps methodology we follow is based on cultural transfer analysis, a choice related to two basic parameters. On the one hand, reception of Kindergarten, as a cultural transfer starting from Germany, is studied with respect to one ethnic group, within a limited time period, which, however, differs in two subgroups in terms of citizenship (Greek-Ottoman), and, mainly, in terms of cultural identity. While residents of the Greek state were mainly identified by their national consciousness – along the lines of modern societies – the Greek inhabitants of the multicultural, multinational Ottoman state were mainly determined by their religious identity as basic element of their national identity. On the other hand, when investigating «the mechanisms of importing foreign cultural assets and the context of its reception»³⁵ cultural transfer analysis better corresponds to the aims of the study.

Education: Transnational Investigations, London, New York, Bloomsbury Academic, 2017.

³³ S. Chatzistefanidou, *Review for Helen May*, in K. Nawrotzki, L. Prochner (edd.), *Kindergarten Narratives on Froebelian Education: Transnational Investigations*, «Historical Studies in Education», vol. 12, 2018, p. 179.

³⁴ For a similar approach that explores which perceptions influenced the founding of the first university in Greece, see P. Kimourtzis, *The European Universities as 'models'. The case of the first University in Greece (1837)* (in Greek), «Neusis. Journal for the History and Philosophy of Science and Technology», n. 1, Summer 2003, pp. 129-150.

³⁵ Chr. Mayer, *Female Education and the Cultural Transfer of Pedagogical Knowledge in the Eighteenth Century*, «Paedagogica Historica», vol. 48, n. 4, 2012, p. 513.

Subsequently, kindergarten's expansion in the context of Greek education is presented and analyzed as a process of cultural transfer. We close the paper by discussing our findings under the light of cultural transfer analysis.

Kindergarten's expansion in the context of Greek education

In the Ottoman empire, an intense phase of Kindergarten development occurred in 1870's, when Greek community of Constantinople made concerted efforts to institutionalize preschool education, accepting its dual function to educate and socialize and, at the same time, to respond to its charitable dimension. These were efforts that didn't occur in an intellectual stagnation. Contrariwise, they took place into a modernist educational orientation, when certain social and intellectual groups of Ottoman society, and consequently of its Greek community, sought a process of a "planned social change"³⁶. Those groups, in the late period of the Ottoman state, set for education the goal of prolonging the existence of Ottoman society by adopting Western educational standards³⁷. In that context, in an attempt system's inability to cope with change to be confronted, an Education Act in 1869, among others, provided girls the chance to participate at all school levels, separating education from the direct sphere of Qur'an's influence and defining a new framework that affected, in our case, the gradual development of women's studies and female professionalism³⁸. As a result of those efforts a hybrid secularization, with peaks and valleys, emerged; religious space was not distinguished from political, but on the contrary, it embraced and modified "secular" ideological forms, participating crucially in the shaping of the public sphere³⁹.

The above are interrelated with a production of pedagogical discourse speeded up impressively at the late 19th century. Pedagogical textbooks issued within the Greek communities of Ottoman state relate to education and learning issues, teaching, history of education and comparative education. Printed books came mainly from publishers of Constantinople and to a lesser extent from those of Athens, Izmir, Berlin and Zurich. Their authors, men and women active in the field of education, usually had run higher education institutions in

³⁶ R.H. Davison, *Reform in the Ottoman Empire, 1856-1876*, Princeton, N.J. Princeton University Press, 2016, p. 6.

³⁷ H. Exertzoglou, *National Identity in Constantinople in the 19th Century. The Greek Literary Association of Constantinople 1861-1912*, Athens, Nefeli, 1996.

³⁸ Em. Dogramaci, *Education of Women in Ottoman and Republican Turkey: A Comparative perspective*, in H. Lowry, R. Hattox, *Varia Turcica*, 25, *Congress on the Social and Economic History of Turkey*, Istanbul, Washington, Isis Press, 1990, pp. 216-217.

³⁹ D. Stamatopoulos, *Reform and Secularization: Towards a Reconstruction of the History of the Ecumenical Patriarchate in the 19th c.*, Athens, Alexandria, 2003.

Constantinople, Izmir or Trabzon. Most of them had continued their studies in Germany or in German-speaking areas, usually with the financial support of wealthy members of their communities. It is a period when Germany and its universities attract students from all over Europe and the world to specialize in pedagogy and in teaching and to monitor the evolution of education science⁴⁰. Prominent educators of the Greek community completed their studies in Germany -Munich (Xanthopoulos and Paranikas), Leipzig (Skordelis and Zamarias), Berlin (Vassiadis and Mostratos). Mazarakis elaborated his doctoral dissertation in German-speaking Zurich. Ioannis Aristocles was an honorary member of the Prussian Ministry of Education. Kalioppi Kehagia was moving in both the German-speaking and the Anglo-Saxon space where she formulated her theory about the education of women.

Cosmopolitanism seems to be a common feature of the authors. They exploited networks of parochial Hellenism and travelled as students or scholars to study practices and theories and to participate at research university laboratories. It is indisputable that their pedagogical thought was based on a constant interaction with the academic staff of the German-speaking space. After all, as students or scholars they took part in a tradition of traveling (peregrination) from one teaching chair to another, with Berlin, Rein's Jena and Wundt's Leipzig being their basic stations.

Institutionalization of Kindergarten is predominantly attributed to educational and authorship activity of Ioannis Aristocles⁴¹. Aristocles counts among the scholars who had contributed to the development of pedagogical thought in the context of Ottoman society as a whole. In fact, for a long time, training of teachers was based on Aristocles's book *The Scientific Education of Children*, one of the first pedagogical books in Ottoman society, which was translated into Turkish and identified key pedagogical thinking at that time⁴². He wrote modernizing pedagogical and philosophical books and textbooks,

⁴⁰ M. Anastassiadou-Dumont, *Les Grecs d'Istanbul Au XIX^e Siècle: Histoire Socioculturelle de La Communauté de Péra, Christians and Jews in Muslim Societies*, Leiden, Boston, Brill, 2012, Vol. 1, pp. 194-195.

⁴¹ Aristocles was a pioneering educator. He transferred to Istanbul ideas and practices of Western countries, contributed to the popularization of new methods and proposed an education that prepared the child for the demands of life. Paradox is that, for centuries now, he was unknown in the historiography of Greek education, while some of the dimensions of his work were better known among Turkish scholars. It has to do with the fact that Aristocles ideologically followed paths – he served the ideology of Ottomanism and the existence of a multi-ethnic, multi-religious Ottoman state, not yielding to the dictates of nationalism- that were not justified from the course of events; I. Betsas, *Pedagogy and Education in 19th Century Constantinople: The Contribution of Ioannis Aristocles*, in K. Dalakoura, V. Deligianni-Kouimtzi, Chr. Tzikas, V. Foukas (edd.), *Issues on the History of Greek Education and Gender (19th and 20th Centuries)*, Thessaloniki, Kyriakidis Brothers, 2017, pp. 83-104.

⁴² A. Bahri, *The Contribution of the Graduates of Mülkiye (Civil Service School) School to History and Geography Education: An Overview* (in Turkish), in V. National Social Sciences Education Congress, Ankara, 2011.

he had a multidimensional educational activity, remarkable involvement in the education reforms at the Ottoman society of the second half of the 19th century. Aristocles was multilingual and participated in European academic networks. It is noteworthy that he was honored by the Ottoman Ministry of Education, the Higher Academy of Rome (L'accademia dei Quiriti), which named him an honorary member, the Prussian Ministry of Education, which awarded him an honorary diploma signed by Robert Viktor von Puttkamer, the Greek Kingdom, and the Sublime Porte for his scientific achievements.

Aristocles published in late 1870's a series of books entitled *Kindergarten*. Those books, written in Greek language, were: *Kindergarten pedagogy* (1876), *Artistic Handicrafts* (1876), *Didactic Games* (1876), *Accounting with Boards of Vocal Accounting and a Box* (1877), *Pragmatics for the Use of Kindergartens with the necessary boards* (1877), *Maternal Handbook for Families and Kindergartens* (1877). In this series, Aristocles argues that education should aim at a comprehensive formation of the individual, mentally, morally and physically. Physical education aims at the health of the body and the development of physical strength, mental facilitates the individual to know the spiritual achievements of mankind, while moral accustoms children to love and make good⁴³. He claims that pre-school education lays the foundation for humanism and true education. Citing the example of pedagogically advanced nations, he sees the establishment of kindergartens as a beneficial action aiming at both the proper preparation for primary school and the care of the children of poor families. He perceives Kindergarten as an institution mainly addressed to grass-roots classes. In the context of such a perception, he published a maternal handbook⁴⁴, seeking to relate family education with the school experience of the child.

Pedagogical influences of Pestalozzi and Froebel, invoked by Aristocles frequently, are obvious. This becomes evident in a number of key assumptions. Traditional pedagogy is treated as a synonym to pain. Child's nature is considered sacred and should be the basis for education. Moral education is based on imitation through example, sincere affection of the teacher, practice of children in love and good. Punishment is rejected and what is proposed is a system of rewards and praise⁴⁵. In Kindergarten children have a happy face, a cheerful heart, are treated by the teacher with motherly affection, they play, sing, walk in zoos and flower meadows, in the neighborhoods of the village and the city, expressing their nature effortlessly. It is advisable for children to enter into a process of inductive reasoning that has as a starting point, where possible, on-site visits to everyday environments: school room, home, relative

⁴³ I. Aristocles, *Kindergarten pedagogy*, *Nipiagogiki* (in Greek), Constantinople, Voutiras Publications, 1876, pp. 15-41.

⁴⁴ Id., *Maternal Handbook for Families and Kindergartens* (in Greek), Constantinople, Self-Published, 1877.

⁴⁵ Id., *Kindergarten pedagogy*, *Nipiagogiki*, cit., p. 71.

and friendly environment, yards, animals and plants, agricultural work, church, village and city. In this respect, he refers characteristically, «Pestalozzi didn't mean to keep the children stuck on the desk all day»⁴⁶.

Such influence is profound even in instruction. Particular emphasis is placed on comprehensive knowledge, which prepares for life as well as the importance of experience in relation to perfunctory learning. Playing facilitates an integrated child development, an assumption based on the perception that all children, regardless of achieving a predetermined level of knowledge and skills, must develop their desire, curiosity and confidence in learning. As young children learn through play, a holistic approach that integrates education and care is important to support child's development. Teaching system incorporates Pestalozzi's perceptual instruction, as a process of learning through experience, allowing children to gradually conquer the elements that highlight the unity and multiplicity of the world. Inspired mainly by Froebel, Aristocles suggests children to be exposed to everyday objects and to discover through appropriate questions and answers the unity and multiplicity of the world around them. He gives special importance to the geometric shapes and especially to the sphere and the cube. After all, he himself promotes Froebelian gifts, as an integral part of his book series. Fully compatible with the Froebelian approach of learning is the way that Aristocles codifies the means that promote it in preschool and primary school age: work⁴⁷, play⁴⁸, arts⁴⁹, imagination⁵⁰. What Aristocles really emphasizes at every opportunity is a religious aspect of Froebel's pedagogy. His view, pervasive in his writings, is that, based on Froebel, early childhood education meets the most basic human need, that is the search for the cause of everything, the Creator. In such a way, he skillfully utilizes the religious dimension of Kindergarten, in order a community identified by its religious identity, to accept it⁵¹.

⁴⁶ *Ibid.*, p. X.

⁴⁷ «[E]ducation should be directed at the full development of human personality, viz the construction, artistic, linguistic and moral work. Exercising of man in this multiple work is a necessity imposed by his nature from an early age», *ibid.*, p. 79.

⁴⁸ «[W]hoever deprives the child of the play and impose a conventional way of education, he becomes the scourge of this innocent age», in I. Aristocles, *Didactic Play* (in Greek), Constantinople, Voutiras Publications, 1876, p. 14.

⁴⁹ «Lack of art is a destruction of one of the innate dispositions of human nature. It is a restriction of the free development of the inner life of human. It is a restriction of his exaltation to God», in I. Aristocles, *Artistic Handicrafts* (in Greek), Constantinople, Voutiras Publications, n.d., p. X.

⁵⁰ «It is well known how much cultivation of imagination from early age is necessary. Images of the good are depicted in the soul by imagination, elevating the mind, and refining the heart by stimulating the good feelings, contribute to the free and easy practice of virtue», in Aristocles, *Kindergarten pedagogy, Nipiagogiki*, cit., p. 33.

⁵¹ S.W. Lee, R. Evans, P. Jackson, *Froebel and Christianity*, «Early Child Development and Care», vol. 100, n. 1, January 1994, pp. 1-42.

Those books, together with various version of programs Aristocles developed for the kindergarten, formed the pedagogical and educational framework of pre-school education for the Greek communities of the Ottoman Empire at the end of the 19th century⁵². Additionally, they formed the basis for a wide dissemination of the institution and a considerable discussion about it. Various factors contribute to this assessment: (I) studies were published promoting a three-year kindergarten institution according to the Froebelian model while embodying, however, elements of the Pape Carpentier's *Ecole Maternelle*, (II) numerous monographs were published discussing pedagogical theories for Kindergarten⁵³, (III) teacher education institutions, which certified the first professional kindergarten teachers, were providing theory and practice of preschool education in accordance with the Froebelian method⁵⁴, (IV) relevant literature and reflection was published in the press⁵⁵, (V) the Ecumenical Patriarchate of Constantinople, a traditional church administration, issued official circulars recommending the establishment of kindergartens based on the principles and the program developed by Aristocles in his book series. Given the influence of the church in a society in transition to modernity, that was the trigger for the expansion and institutionalization of Kindergarten within the Greek communities⁵⁶.

A decade later, Froebelian pedagogy and Kindergarten institution were gradually spread throughout the Greek state. German pedagogical discourse was highly valued by the Greek educational community since the first decades of the establishment of the Greek state, when school institutionalization was based on transfers of European – mainly German and French – educational institutions. At the last quarter of the 19th century, under the weight of changes taking place in Greek society, cultural transfer across the German and Greek borders was not anymore one-way process. German scholars reinforced arguments of part of the Greek intelligentsia seeking intellectual production to disengage, to some extent, from classicism and focus on contemporary

⁵² A. Kagiadaki, *L'Ecole Maternelle Grecque et les Theories Pedagogiques Europeennes (1830-1936)*, Thèse de doctorat des Sciences d'éducation (Sous la direction de Jean Houssaye), Université de Rouen, 2009, pp. 114-125.

⁵³ In a contest, a series of books about the theory of the kindergarten under the Froebelian approach was awarded. In a relevant publication it is mentioned that the awarded books based on Hermann Goldammer's books on the Froebelian gifts; I. Betsas, *Handbooks and Curricula for the Greek Kindergartens (1840-1910)* (in Greek), «Proceedings of the 7th Conference on History of Education», 2014.

⁵⁴ In some of those institutions, maintained by the Greek community or the Ottoman state, Aristocles had a leading role in shaping pedagogical approaches and curriculum design.

⁵⁵ In their columns, newspapers organized public debates on the following issues: «Are kindergartens necessary? What should be their organization? What is their program? Should be part of the elementary education? Should they be public or private?».

⁵⁶ I. Betsas, *The Institutionalization of Kindergarten in Greek Education: Systematic Efforts of Parochial Hellenism in the 1870s and 1880s* (in Greek), «History of Education», n. 6-7, 2007, pp. 153-166.

reality of the Greek society⁵⁷. At the same time, a network of scholarships was established, in force until World War II, contributing crucially to a key cultural influence of Germany in Greece, a tendency fully applied to the field of pedagogy. Many Greek fellows were attending classes both in Leipzig and Jena to learn pedagogical science “in situ”. They transmitted theories of scientific Pedagogy and mainly the Herbartian approach, which spread rapidly in Greece, as in fact the first pedagogues at the University of Athens⁵⁸ had specialized in Germany⁵⁹.

Greek schooling at the last quarter of the 19th century, was called upon to respond to a multidimensional challenge, which brought together irredentism aspirations, expectations from modernization of society but also embedded perceptions of education as a vehicle of social mobility. Romantic nationalism was pervasive in Greek society, requiring education to form school population towards a single language behavior, historical and national consciousness with roots to ancient Greece. Absolute centralism on textbooks, curriculum guidelines, teacher training are considered as consequences thereof⁶⁰. However, that dominant perception on the role of the school could be considered also consistent to a phenomenon of over-education of population, long before the massification of education. Mass schooling related to political planning of the social elites but also the expectations of the peasantry to be socially mobilized. In that context, the intention of the rising middle class was education to follow Western standards, to serve economic growth and to provide channels for the exploitation of educational capital and excellence through public or private domain.

In the field of preschool education, in particular, two traditions had been formed until the 1870s, attempting to argue with models of education applicable in other countries. The chronologically first, was expressing romantic pedagogical philosophy and was represented by the Protestant missionaries, who proceeded with mass publication of translated books, in order to establish kindergartens as part of their charitable mission⁶¹. One other tradition was

⁵⁷ G. Kontomitros, *German Reform Pedagogy and Its Effects on Greek Education during the first Decades of the 20th Century* (in Greek), Doctoral Thesis (Supervisor: Ch. Charitos), Volos, University of Thessaly, 2006, pp. 271-277.

⁵⁸ P. Kimourtzis, *University of Athens 1837-1860: the first generations of teaching staff* (in Greek), Doctoral Thesis (Supervisor: G. Dertilis), Athens, University of Athens, 2001; C. Lappas, *University and students in Greece during the 19th century*, Athens, Historical Archive of Greek Youth & National Hellenic Research Foundation, 2004.

⁵⁹ P. Nikolopoulou, *The Course of the Scientific Field of Pedagogy towards Autonomy and the Procedures of its Establishment in the Academic Community: The Case of the University of Athens* (in Greek), Doctoral Thesis (Supervisor: D. Karakatsani), Korinthos, University of the Peloponnese, 2014, pp. 47-48, p. 67. Famous fellows were Papamarkou, Oikonomou, Moraitis and the later Professors of Pedagogy at the University of Athens, Pantazidis and Zaggogiannis

⁶⁰ Th. G. Zervas, *Resurrecting the Past, Constructing the Future: A Historical Investigation on the Formation of a Greek National Identity in Schools, 1834-1913*, Doctoral Thesis (Supervisor: Noah W. Sobe), Chicago, Loyola University Chicago, 2010.

⁶¹ Chatzistefanidou, *History of Preschool Education*, cit., p. 269.

formed within the Society for Promoting Education and Learning, a private initiative to enhance women's education, which proceeded to anthologies and translations of a series of books corresponding to the spirit of the method of Pape-Carpentier and "L'école maternelle"⁶².

A third tradition, that appeared later in the decade of 1880s, formed the establishment and institutionalization of the kindergarten and the adoption of basic principles of Froebelian pedagogy. Catalytic in that direction was the influence of Ekaterini Laskaridou, who proposed an authentic introduction of Froebel's method and the establishment of the Greek kindergartens. Laskaridou contributed to the dissemination of Froebel's views through publications in journals that mainly expressed demands of women's movement of that time and a series of relevant books, which she herself wrote or translated into Greek. These books are as follows: *Images of childhood. Short stories for children 8-10 years old* (1870), *About Froebelian Kindergartens* (1880) – it includes an introduction to the Froebelian system and also summaries or translations of von Marenholtz-Bulow's texts, *A few things about Friedrich Froebel* (1882), *How children should have fun* (1883), *The book of our little ones. For children 6-8 years old* (1884), *The Froebelian System* (1884), *Enjoyment of children. Stories for children 7-9 years old* (1884), *Treatise on the Froebelian System* (1885), *Rhythm-Play for families and Kindergartens. Poetry and music* (1887).

According to Laskaridou, care, education and protection of early childhood should correspond to children's nature. Play and work that ensure free expression and creativity of children are the most appropriate means to achieve the goals of education that refer to mental, physical and moral development. The kindergarten, exploiting these basic principles, is the best possible starting point for human education⁶³. Play and work are considered to be the foundations of the Froebelian method. She prefers the guided play, as pedagogically useful, while free play leads to boredom. Important are her attitudes in relation to the value of children's entertainment⁶⁴. She suggests the faithful implementation of Froebelian system not only for early childhood education, but also for children at the first four grades of elementary education and even beyond⁶⁵.

In her publications, Laskaridou made little use of translation as a technique for disseminating Froebel's ideas. The only case of translation that is identified, as evidenced by an explicit reference of the author, referred to a text of Baroness Marenholtz-Bulow. On the contrary, Laskaridou presented her own approach to the Froebelian system, adapting the method, as she considered more appropriate for the Greek educational reality⁶⁶. She promoted an interpretation

⁶² Kagiadaki, *L'Ecole Maternelle Grecque*, cit., pp. 46-55.

⁶³ E. Laskaridou, *About Froebelian Kindergartens*, Athens, Parnassos Press, 1880.

⁶⁴ A. Kagiadaki, *Ekaterini Laskaridou (1842-1916). Educational Action and Pedagogical Ideas* (in Greek), «History of Education», n. 9, 2011, pp. 55-73.

⁶⁵ E. Laskaridou, *Treatise on the Froebelian System*, Athens, Parnassos Press, 1885.

⁶⁶ Chatzistefanidou, *History of Preschool Education*, cit., p. 380.

of Froebelian pedagogy focusing on the elements that could seem useful in relation to social and educational needs of the Greek society, while putting on the sidelines at the same time metaphysical dimension of Froebel's work. She applied the Froebelian model in close relation with social and economic conditions of her time, and especially enlistment in the national aspirations⁶⁷.

To a large extent, Laskaridou transferred to Greek society one of the versions of Froebelian pedagogy, the one formed by Baroness Marenholtz-Bulow. She had studied for 14 months in Dresden, where she was introduced to the pedagogy of Kindergarten, according to a school-based, ethnocentric perspective, adopted by the Baroness. This proves that she was well aware of the method in terms of one of its versions that expresses its first wave of dissemination, as mentioned above. Laskaridou came from a wealthy upper-middle-class family, she enjoyed travelling throughout Europe and was a carrier of nationalist ideology, which dominated the Balkans. Upon her return to Greece, she took over the management of institutions for female teachers taking the opportunity to apply and disseminate her pedagogical ideas⁶⁸. She estimated that from 1885 onwards Froebelian method was accepted within the institution she was running, although she found that its implementation was flawed, referring only to gifts and toys, while excluding aspects related to emotion and volition⁶⁹. It is clear that Laskaridou refers to a necessary compromise that has been made to promote Froebelian pedagogy to Greek settings, even if such a promotion relates to a private school. After all, she faced skepticism and reaction from parents, who were judging that the method lacked seriousness, did not yield specific learning outcomes and, in addition, was costly⁷⁰. However, it seems that it was a compromise to which Laskaridou continued to give in and overall characterized the aspects of implementation of the Froebelian system in the Greek schools' settings for the next decades. This is evident through the Kindergarten programs related to Laskaridou, a curriculum of Teacher Institute at Kallithea (1897) and the State curriculum (1896) that instituted Kindergarten as a private school organization throughout Greece. The programs implemented Laskaridou's proposals, alternating play and works. However, although they applied the Froebelian method, they remained far from the spirit of his pedagogical philosophy, they departed from

⁶⁷ Kagiadaki, *Ekaterini Laskaridou (1842-1916)*, cit.

⁶⁸ *Ibid.*, pp. 57-58.

⁶⁹ «So, since, in principle, the Froebelian method became admissible in terms of the teaching method, although its success essentially depends on the consolidation of its high truths and its most complete implementation, it is a great delay, a lack which it is about to show, as well as time passes, its sad consequences the fact that the whole Froebelian system has not yet been introduced; that is, the means for strengthening heart and volition have been omitted, and therefore the system has been drawn up incompletely and unilaterally», E. Laskaridou, *Froebelian System in Greece*, «Hestia», n. 505, 1885, p. 608.

⁷⁰ Kagiadaki, *Ekaterini Laskaridou (1842-1916)*, cit., p. 58.

the principles of child-centeredness, imposing uniformity, discipline and intense schooling, especially in terms of language learning⁷¹.

Studies referring to 19th and the beginning of 20th centuries use analytical and theoretical tools that interpret the narrative of Greek preschool education in relation to the social history of “modernization”⁷². Specifically, the main form of study of the Greek kindergarten in the reference period is the dissemination of the Froebelian system as educational novelty, reversed in fixed perceptions and rigid beliefs of Greek society about instruction and pedagogy⁷³. Considering kindergarten as an educational novelty, hybridity of educational concepts and practices of Kindergarten emerged as a component of the first wave of its expansion under Marenholtz-Bulow’s version and as a way the Greek middle class, pursuing for a kind of modernism, was perceiving the content of educational novelty. Under those circumstances, the result led to a private sector Kindergarten closely linked to preparation for the first grades of primary school. Greek Kindergarten provided conditions for excellence for the few who could afford it, but at the same time, it depended on the parents’ expectations for intensified work, standardization and discipline, far from Froebel’s spirit. At the same time, in the context of modernization as well, interpretive schemes connect the development of kindergarten with the dynamics of women’s education and the improvement of the position of women in Greek society⁷⁴. Finally, considering Kindergarten as an institution related to national priorities, a version adopted by many studies that analyze Greek society as a carrier of perceptions deriving from romantic nationalism, hybridity of Froebelian method is understandable in relation to the need for early educational intervention for linguistic and cultural homogenization of minority population and construction or enhancement of national consciousness⁷⁵.

⁷¹ Chatzistefanidou, *History of Preschool Education*, cit., pp. 381-382.

⁷² S.G. Magnusson, *Social History as ‘Sites of Memory’? The Institutionalization of History: Microhistory and the Grand Narrative*, «Journal of Social History», vol. 39, n. 3, March 1, 2006, pp. 891-913.

⁷³ V. Alexiou, *Froebel’s Acceptance in Greek Preschool Education* (in Greek), «Macednon», n. 11, 2003, pp. 233-252; V. Orfanos, *Evidence for the Spread of the Froebel System in Greek Kindergartens in the 19th Century* (in Greek), «Synantisi», n. 6, 1985, pp. 68-78.

⁷⁴ E. Fournaraki, *Training and Education of Girls. Greek Concerns (1830-1910)*, Athens, Historical Archive of Greek Youth, 1987, p. 178.

⁷⁵ However, hybridization of Froebelian pedagogy was rejected in some cases where a policy for changing language behavior was sought. Indicative in this regard was the example of communities located in disputed areas of the Ottoman Empire at the early 20th century, where Froebelian method, after being applied for a few months, had been criticized as inappropriate and rejected.

Data discussion under cultural transfer analysis

Investigating the first step of transfer process, calls for analyzing interests, motives and reasons guided the interaction of cultural traditions. In parallel, it clarifies reasons of acceptance or denial of particular cultural products. Process of modernization could be a key concept for understanding the cultural environments decontextualizing a pedagogical theory, as in the case we are studying. However, this is not the same degree of modernization in both cases of the networks where Greek education was developed.

In the school network of the Greek communities of Ottoman society, modernization presupposed a type of secularization. Modernization in a society harmonized with the codes of pre-modern religious authority rather than those of the 19th European century, was intertwined with a relative autonomy of the educational space; this could be ensured by a pedagogical proposal that would not contradict basic religious dogmas, while, at the same time, would release forces having a gradual effect in modernizing society. Such a proposal represented Froebelian pedagogy, an educational theory and practice which had as its starting point metaphysical connotations compatible – even if appropriate processing by mediators was required – with Christian doctrines, while, at the same time, was establishing women in the workplace and was setting foundations for an education not based on dogmatism and catechism. Besides, a fertile ground for transferring an originating in Germany pedagogical theory had been created through cross-cultural contacts and processes of acculturation structured by German-Ottoman political, military, and educational partnership.

In the case of the Greek state, modernization should be understood in terms of values and attitudes of the rising middle class, concerning intellectual virtue of European mentality and the necessary mediation of education in spiritual formation and social stratification. In such a framework of values, Greek-German cultural interaction was intensified at the late 19th century. German culture was expressing largely romantic approaches of social reality, compatible with nationalism and irredentism, and, additionally, contributed to the revival of the ancient Greek archetype of «kalos kagathos»⁷⁶, through the neohumanistic ideal of education. Thereafter, diffusion of Froebelian method was consistent with the high prestige German pedagogy enjoyed in Greece.

The second step in cultural transfer analysis requires a focus on forces and resources that make the transfer valid into the receiving culture. It analyzes intermediaries (persons, media, institutions) and mechanisms (translation, rendering, or derivative) of cultural transfer and their role and function in decontextualization process⁷⁷. In relation to people mediated the transfer of

⁷⁶ «Kalos» referred to physical qualities, while «Agathos» referred to intellectual excellence and high morality.

⁷⁷ Mayer, *The Transnational and Transcultural*, cit.

Kindergarten in the two networks functioning in the frame of Greek education, Aristocles and Laskaridou, who played a crucial role as intermediaries, come from the upper middle class of their societies, enjoying high social status and privileged relations with the authorities. Acquisition of a high educational and cultural capital is inherent with cultural extraversion, as both of them are multilingual and maintain intensive relations with foreign societies. Both of them can be considered as innovators, shaping cultural transfer in their social settings. Decontextualization takes place by means of a selective reproduction and transformation of knowledge: towards religiosity, in the case of the Greek communities of Ottoman Empire; towards nationalism and schooling, in the case of the Greek state.

As regards the mechanisms exploited in the process of decontextualization, it is noteworthy that translation is almost completely absent in both cases. Aristocles' book series seems to use structure and motifs that dominate French and German books of the time (Pape Carpentier, Fanny Charles Delon, Charles Delon, Goldammer, Kohler) without being translated or cribbed. Rendering and reinterpretation of passages featuring his books on Kindergarten, they possibly provide his mediation necessary cultural signification and negotiation with expectations of the community and the state censorship system. Respectively, Laskaridou's texts, except in a case where it is translated a text entitled *Introduction to the Froebelian Kindergarten Guide* by Baroness Marenholtz-Bulow, seem to be exclusively her own intellectual work, which is an authentic cultural transfer of a schooling version of Kindergarten institution. Quaintly enough, Laskaridou, who transferred the Froebelian theory to Greek education later, in relation to Aristocles, never mentioned to his work nor did she include the Greek communities of Ottoman Empire among the areas applying the pedagogy of kindergarten⁷⁸.

Focusing on the third step, recontextualization relates on how meanings and interpretations of Froebelian pedagogy were altered in local contexts. Contact with a version of Kindergarten already transformed by Froebel's descendants should be considered as a key parameter that defined recontextualization. Obviously, Laskaridou performed an agency of the first wave of dissemination of Froebelian pedagogy, transferring Marenholtz-Bulow's aspects of a preschool education, addressing to middle and upper social strata, seeking preparation for school career and a political socialization towards nation building. Aristocles, on the contrary, advocates a version of kindergarten which seems to be related with the second wave of dissemination, proposed by Henriette Schrader-Breymann: a kindergarten mainly addressed to children of lower classes, which involves motherly love and Pestalozzi's practices, and includes free play, work, arts and imagination.

⁷⁸ Laskaridou, *Froebelian System in Greece*, cit.

In both cases, recontextualization of Froebelian pedagogy can be contemplated as a result of the language reality characterizing the Greek-speaking communities at the end of the 19th century. This was specifically a linguistic division between, on the one hand, an official formal language, emanating from the ancient Greek literature and the “sacred” ecclesiastical texts, used in church, literature, education network, formal contexts, and, on the other, a popular language used in conversation, home, marketplace, songs and popular novels. Froebelian approach in language acquisition as a result of environmental factors affecting development and, especially, children’s communication and interaction during play, couldn’t be compatible with requiring school to form a linguistic behavior different from children’s mother tongue. In this context, language courses were introduced in the relevant curricula, at least for the third grade of kindergartens. Hybridity led to a reality quite outlandish from Froebel’s pedagogical principles.

While, in the case of the Greek communities of the Ottoman state, kindergarten was a quasi-public institution, in the Greek state, institutionalization of preschool education related exclusively to the private sector initiative. Such a range of different options of preschool education can be understood as a result of different political and social priorities that were enriching recipient cultures. Recontextualization in a devout church-oriented society took the form of a charity-motivated intervention, which would alleviate popular strata and identify them more actively in terms of their ecclesiastical identity. In contrast, the Greek nation-state institutionalized a preschool education closely linked to middle classes’ aspirations toward an education performing social choice. Schooling of kindergarten was compatible with a dominant social perception that one level of education is a sufficient and necessary condition for the preparation for the next level, ensuring, at the same time, uniformity in its application, due to an extreme centralization of educational policy of the Greek state intervening even in curricula and didactic methods in private schools.

Over time, such a hybridization seems to be embedded and stabilized as an indigenization. Any educational approach, even far removed from Froebel’s principles, using elements from Froebel’s Kindergarten, could be characterized Froebelian. Actually, Froebel’s ideas were incorporated «as ahistorical and ‘natural’» to the Greek society. Since then, a reality of educational practice deviating from pedagogical theory is a common phenomenon, while political discourse is often sprinkled with a fictitious «pedagogical smear», when confronting the demand of the Greek society for educational changes. Given the above, a transnational perspective under new-institutionalism could shed light on critical aspects on the path-dependence of hybridization and indigenization processes of pedagogical thought in Greek education.

Gentile in Spain: an historiographical mirage

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ABSTRACT: This article studies the influence of Italian educationalist and philosopher Giovanni Gentile in Spain. In the first part, the main features of the Gentile's thought are analysed as well as the key reform that he implemented in Italy as Mussolini's first Minister of Education. In the second part, the limited influence of his thought in Spain is studied, both in the main pre-war pedagogical tendencies and in the educational policy and thought after the civil war. It is defended that the seeming coincidence of the Spanish secondary school reform of 1938 and the Gentile Reform is purely superficial, since Spanish Catholicism had a program for reform (primarily aimed at securing the interests of Church schools) whose goals were completely independent from Gentile's. Then, the supposed influence of the Gentile Reform on the Spanish reform of 1938 is no more than a historiographical mirage.

EET/TEE KEYWORDS: Educational thought; Gentile; Actualism; Secondary education reform; Catholicism and education; Spain; XXth Century.

It is a generally accepted notion in Spanish historiography that the Gentile Reform had a direct influence in the educational policy of the Franco Regime¹. In its approach to education, as in other areas, the Spanish regime that emerged after the Civil War looked to Fascism for inspiration. At the same time, the similitudes between the Italian reform of 1923 and the Francoist reform of secondary education carried out in 1938 could be seen to indicate a direct influence. While this would seem to support the idea that the influence of the

¹ See, especially, F. Morente, *Los fascismos europeos y la política educativa del franquismo*, «Historia de la Educación», n. 24, 2005.

pedagogical ideas of Giovanni Gentile had considerable influence in Spain, this affirmation is actually the result of a series of analogies and assumptions that do stand up to empirical scrutiny. This article defends the idea that the supposed influence of Gentile in Spain was more illusory than real, i.e., that it is no more than an historiographical mirage.

1. *The Gentile Reform of 1923 and its cultural foundations*

1.1. *Philosophy of the spirit and the dialectic process*

In 1923 Italy's school system underwent a radical reform that was destined to last a very long time, and to considerably influence the country's pedagogical approach and its culture in general. The person behind the reform, which goes by his name, was the philosopher Giovanni Gentile, Minister for Education from October 1922 to June 1924. To understand the Gentile Reform in its historical sense, in its original formulation at least (without considering its subsequent partial revisions), we need to first take a brief look at its author's ideas because the reform concisely reflects his philosophical theory.

When Gentile was appointed Minister for Education, he had already developed a precise philosophical stance on education, and a clear vision for the school system and school culture. The speed with which he succeeded in preparing and launching his organic reform within a matter of months bears witness to how he had already laid its cultural foundations and decided its organizational architecture. Over the course of four years, he had written his principal philosophical works: from *La riforma della dialettica hegeliana* (1913) [The Reform of Hegel's Dialectic] to the *Teoria generale dello spirito come atto puro* (1916) [The Theory of Mind as Pure Act], and the *Sistema di logica come teoria del conoscere* (1917) [System of Logic as Theory of Knowledge]. His first systematic work was of a pedagogical nature, however. It was in two volumes and entitled the *Sommario di pedagogia come scienza filosofica* (1913-14) [Summary of Pedagogy as a Philosophical Science]. After the end of the First World War, this work was followed up with *La riforma dell'educazione* (1920) [The Reform of Education], *Il problema scolastico del dopoguerra* (1920) [The Post-War School Problem], *Educazione e scuola laica* (1921) [Education and Lay Schools], and *Preliminari allo studio del fanciullo* [Preliminaries to Children's Studies] (written in 1921-23, and published as a book in 1924)². Gentile always sought to extend his philosophical concepts

² His first and fundamental pedagogical essay, however, was *Del concetto scientifico della pedagogia* [On the Scientific Concept of Pedagogy] in *Rendiconti della Reale Accademia dei Lincei. Classe di Scienze Morali, Storiche e Filologiche*, vol. IX, n. 11, 1901, pp. 1-35 [637-671].

to pedagogy. He had a very strong influence on Italian culture, and on the world of education in particular, initially arousing enthusiastic support, but also meeting with growing opposition later on.

The first part of the *Sommario* is entitled *L'uomo* [Man] and contains all of Gentile's philosophy of the spirit (or mind) in a nutshell, as a premise for his subsequent pedagogical writings. The whole system is based on the concept of the immanence of Reality in the Spirit, and of the Spirit as a self-accomplishing and absolute Act, not based on any presupposition. There is absolutely no premise to the *act* in which the Spirit or Thought is realized: no 'things', nor nature, not even history (in the sense of the past). It can originate from none other than itself. Whatever might be presupposed can only be presupposed by and for Thought, so it is still thought. A reality envisaged as being separate would be a reality which could be said to be neither thought nor thinkable in the very act of thinking it. So nothing is thinkable or conceivable outside the thought that thinks. Because it places the spiritual act as the absolute beginning of reality, Gentile's theory has been defined as actualism, or actual idealism. In his view, the whole of Reality is posited and created by Thought in action, or rather by Thought inasmuch as it is thinking 'in the moment'. This thinking Thought (or reflective awareness), that he also describes as transcendental, or the universal Subject, is pure creative activity. It is Thought that posits, and therefore creates, the whole of reality by thinking it, and posits itself as part of this reality. That is why we can say that the Spirit is self-generation or *autoctisi*. «The only solid reality that I feel entitled to claim, and with which all reality that I can imagine must therefore be linked», writes Gentile, «is the one that thinks; the one that is realized, and is therefore real, only in the act of its thinking. Hence the immanence of all the thinkable in the act of thinking or, simply put, in the act: because, for the previously-mentioned reasons, there is nothing actual other than thought in action»³.

Being created by Thought, all reality is therefore thought and cannot have any other origin. Everything is in thought, and everything is thought. There is nothing transcendental in this, which is why Gentile's stance is a form of absolute immanentism. Thinking is simply acting, or rather the realization of the Spirit, its productivity; and acting is simply the realization of thought. The act of thinking Thought, or pure Act, is self-generating, but through an object that is a necessary condition for it to happen, and that cannot be separate therefrom. The making of the pure Act develops dialectically in the two moments of thesis and antithesis, both unilateral and abstract, and in the moment of synthesis. The thesis consists of Thought itself as pure subjectivity or, in other words, as an abstract thinking Subject. Thought cannot remain pure subjectivity,

This work was subsequently published in: *Scuola e filosofia*, Sandron, Palermo, 1907, pp. 1-36; and in *Educazione e scuola laica*, Firenze, Vallecchi, 1921, pp. 7-46.

³ G. Gentile, *Introduzione alla filosofia* (1933), Firenze, Sansoni, 1952, p. 20.

however, because it is always Thought of an object. It is therefore necessary for thinking Thought to be translated into a thought (already) thought or, in other words, to give rise to the various empirical subjects and objects that represent the antithesis, or the object. Were this not so, the Subject would remain abstract because, despite being Thought, it would lack any object.

Thought cannot be separated from itself and forget itself in the object, however. It has to return to itself, reuniting and identifying in itself the multiplicity of empirical subjects or objects. This is the moment of Synthesis that, alone, lends concreteness to the Thesis and the Antithesis. All reality acquires concrete value inasmuch as, being thought by the Subject in a given moment (and precisely because it has been thought), the Subject identifies it with himself, so reality is released from its empiricity – i.e. from space and time – and can become part of the universality of the self. In short, the Subject cannot live concretely without objectifying himself, and consequently without multiplying himself. He cannot be present in himself without translating himself from act into fact, from thinking into thought. He can grasp himself not in his concrete present, but in his abstract moment that has already passed, so he cannot avoid becoming nature. On the other hand, if the Subject lost himself in the object instead of returning to himself, if he failed to include the multiple in the one, and did not make the fact come within the circle of his activity, the life of the spirit would come to a halt. Time, space, nature and the single empirical subjects unfold within the circle of this dialectic process. Space and time, with their multiplicity of points and instants, exist only inasmuch as they are thought by the self, whereas by thinking them concretely in the synthesis, the self reunites the points and instants in its unity, identifying space and time with itself.

Nature – the object *par excellence* or, in other words, the antithesis – is the act of Thought that, through space and over time, has become solid, a fact, in other words the past of Thought. So Nature is what has already been thought by the self, but – in the very concrete act of thinking – the self absorbs it in the Synthesis, thereby unifying it. Interpreted as part of this Nature, the various empirical subjects – considered outside the act of thinking – resemble a like number of objects already posited, or already thought by the Subject. The transcendental Self, absolute subjectivity, resolves in itself the particular subjectivities or empirical selves, which it unites. It is not the empirical selves that are real and immortal, it is the single transcendental Self. According to Gentile, subjects are not particular individual people, but «the universal Subject (that is) one for all». It is the Subject who knows and thinks, who «has absolute value and is absolute act», such that the term Subject «has no plural». Individuality is thus posited and reabsorbed dialectically in the unity of the spiritual act. It is rooted in a superior personality, and it is only in the latter that it is real⁴.

⁴ G. Gentile, *Sommario di pedagogia come scienza filosofica (1913-14)*, Firenze, Sansoni, 1925⁵, Vol. I, pp. 20 and 23.

This superior personality contains our own «and all empirical personalities, and everything else that unfolds in space and time, and we cannot say it exists before the birth or after the death of the other because this before and after would make it fall apart, from the one into the multiple; but it is beyond any before and after, in opposition to time, that it brings into being, in eternity»⁵. This superior personality is obviously the Spirit, of which thought is not an attribute, but its actuality, inasmuch as thought should be intended – in Gentile's view – «not as the thought that a man can and must think, but as what is actually being thought (in the moment), which is all in the self-same act of thinking, an act that realizes our spiritual being as the only being of which we can speak in concrete terms»⁶. The actual Thought is therefore the one and only reality: «it is everything; outside the actual thought even the Self is an abstraction»⁷. So the real, concrete reality is in the Synthesis, or the moment when the Subject returns to himself, concretely thinking the Object. In relation to these three moments of the pure Act, Gentile establishes the three absolute forms of the Spirit – art, religion and philosophy – which represent the highest expressions of its dialectic becoming.

1.2. *Art, religion and philosophy*

Being associated with sentiment and immediacy, art is the moment of pure subjectivity inasmuch as the subject freely expresses himself in a fantastic world of his own creation. But this pure subjectivity is abstract because for Thought to be concrete, it must be thought of an object (as mentioned earlier). Pure art therefore only becomes concrete when it is expressed in a work of art (a poem, a painting, a statue...), i.e. in the object. These two aspects of art are equally necessary. To use an analogy, we could say that pure art is to its objective expression what the artist's personality is to his work of art. Without the work of art the personality, is destined to remain sterile and abstract.

Again according to Gentile, «Religion may be defined as the antithesis of art. Art is the exaltation of the subject released from the chains of the real in which the subject is posited positively; and religion is the exaltation of the object released from the chains of the mind, in which the identity, knowability and rationality of the object consists»⁸. Religion is the highest form of awareness of the real, before philosophical self-awareness. It is the moment of objectivity inasmuch as the Spirit sees the object that is God, recognizes Him as infinite,

⁵ *Ibid.*, p. 126.

⁶ Gentile, *Introduzione alla filosofia*, cit., p. 16.

⁷ *Ibid.*, p. 24.

⁸ G. Gentile, *The Theory of Mind as Pure Act* (transl. by Wildon Carr), London (1922), Bari, MacMillan and Co., Ltd, 1920, p. 226.

and in this infinity annihilates and forgets itself. In themselves, art and religion remain an abstraction, however. Art is never subjective and personal enough not to reveal – in the fantasy world it creates – an intrinsic law superior to any subjective whim (integration of the objectivity in the subjectivity). Religion, on the other hand, is never so absolute an exaltation of the divine object that it fails to fill and empower the most intimate subjectivity of the personality of the believer (integration of the subjectivity in the objectivity). The real reality always appears as a synthesis of subject and object, but this is philosophy. Art and religion can only exist as concrete forms of spiritual life inasmuch as they are both philosophy. It is the synthesis that makes the thesis and antithesis possible. It is in Philosophy, as a pure act of thought, that art and religion are concretely realized. Being the synthesis of subjectivity and objectivity, Philosophy is the highest degree of development of the Spirit. Philosophical thought is a living unity that overcomes all opposition, and is actuated historically. In other words, art and religion, which are in themselves abstract, acquire concrete value only if they enter into the historical process, i.e. if they are realized in the reality of History. But since History is none other than the process of thought, or rather it is Philosophy, we can conclude that art and religion only become concrete in Philosophy. It is the Synthesis, i.e. Philosophy, that lends concreteness to both the thesis and the antithesis.

Gentile's stance gives rise to numerous corollaries. For a start, historiography, philosophy and history come to be identified. Historiography is simply the Thought that consciously relives the reality of the past and, likewise, philosophy is the conscious thought of this reality. History, being the process of Thought, identifies itself with philosophy – hence the identity of historiography, philosophy, history. Gentile's view of science is also rather particular, as he places it in between art and religion. Because it has a phenomenic and subjective view of reality, it is a part of art; but because it presupposes an external reality (an object independent from the subject), it comes within the sphere of religion. Although science swings between art and religion, it does not unify them (as philosophy does) in a synthesis. Instead it combines the limit of objectivity, typical of art, with religion's lack of subjectivity. In short, science – like religion – presupposes the object and is therefore dogmatic, whereas philosophy is critical and systematic. From Gentile's perspective, religion remains an inferior form of the Spirit that is destined to be superseded by Philosophy in terms of thought and, as regards concrete experience, to be entirely subordinate to the historical ethicality of the State.

Incarnating the universal Spirit, the State is the concrete source of those goals that must inspire every society, so it is a moment of unification. Individuals and groups are 'relative' vis-à-vis the State, which is 'absolute'. As pure particularity, the individual is nothing because he has to depart from this particularity in order to realize and express himself, and come to form part of an organic life, which is that of the State. On the other hand, the State is not an external boundary

of the individual, but the very process by which the individual goes beyond himself in his empirical nature to become universalized and thereby belong to the universality, which is his most profound *raison d'être*. The State is history because it is concrete activity of the Spirit, perpetual action; and it is morality because it reconciles its authority with the freedom of its citizens, of which it is also the main, fundamental educator. It has a moral character because ethicality entails constantly going beyond particular interests in a universal that does not suppress them, but combines them into a superior unity capable of organizing and regulating them so as to enable their realization. On this issue, it is hardly surprising that Gentile's political thought was promptly adopted by Fascism, and translated into an authoritarian and anti-individualist view of the State featuring a 'mystique' of the Fatherland and its spiritual 'mission'.

1.3. *Education as a 'making of the Spirit'*

Gentile recalls that the goal of education had always been to train the human being. The real problem lay in establishing what the human being is, what makes him specific and distinctive. Efforts have always been made to clarify, by means of a philosophical type of investigation, what it is that makes human beings human and not plants, stones or other physical objects. The idea of education has always been a specification of the idea of mankind, and every society has sought to train its younger generations according to the models of humanity and ideals prevailing at the time.

For Gentile, it is the Spirit – or Thought – that represents the peculiar characteristic of human beings, what distinguishes them from all other realities of the universe. It is the spirit that founds the body, and it is the spirit, or soul ('anima') that makes the body human (and consequently different from all other types of body). As Gentile put it: «man is not body and soul; being soul, he is soul alone, and his body only exists as a moment of the soul»⁹. The 'soul' or 'spirit' cannot be supplied from the outside because it is a constitutive element of the human being. As mentioned earlier, Gentile envisages man, or the empirical self, not as an autonomous entity, but only as a 'moment' of the Spirit that actuates his development. Single individual experiences, like the great civilizations and different cultures, are moments of the same continuous process. Education, intended as a spiritual act of a developing subject, therefore coincides with the process of realization of the Spirit. We do not 'learn' (i.e. we do not 'receive' something transmitted by others), we become, we progress 'inside' (thanks to the progression of the Spirit in each of us). Education is the

⁹ Gentile, *Del concetto scientifico della pedagogia*, cit.

‘making of the Spirit’. It is the shaping of human beings as spiritual realities, and the historical development of the «most universal act identical in everyone»¹⁰.

If the Spirit unites human beings, education is not just a social relationship, but also «a spiritual act, which indissolubly binds two spirits»¹¹. Education occurs within the unity of the Spirit, between two moments of it (the teacher and the learner) tied together by a bond that leads to a ‘fusion of the souls’. In the act of educating, teacher and pupil go beyond empirical differences and, as if by spiritual contagion, form a single mind. In the pupil who listens to the teacher, and in the teacher who speaks to the pupil, it is their shared Spirit that speaks to itself, and listens to itself, in one and the same spiritual process. The truth the pupil seeks and discovers is the truth that resonates from the spirit of the teacher in his words, the one truth that is in the Spirit. The empirical selves of the teacher and pupil are one and the same self-educating spirit. They build on their knowledge, the teacher reconstructing (discovering again) what he knows in the lesson delivered to the pupil, the pupil constructing his own knowledge (discovering it for the first time). The fundamental condition for this to happen is that the teacher and pupil must know how to ‘sing in tune’, otherwise the educational act cannot take place. «If the learner himself is unable to feel this, which implies his full spiritual unification with the teacher, every example the latter may be able to offer will remain ineffectual and mute»¹², warns Gentile. From this perspective, the traditional problem of the relationship between the authority of the teacher and the freedom of the pupil falls away. According to Gentile, the teacher acquires authority when interpreting and reconstructing knowledge, when he charts the history of mankind or the genesis of the sciences, arts, institutions, and culture as a whole. In the quest for knowledge, in moving from ignorance to understanding, the pupil gains a sense of freedom because he recognizes his teacher as the interpreter of his culture, his better self, that he seeks to emulate by adopting the discipline of his studies. In obeying the teacher, the pupil obeys that better part of himself, that ideal self that the teacher embodies and the disciple tries to become through the educational relationship. The path towards knowledge is therefore also the path towards the rules without which freedom cannot exist.

So education is not a ‘fact’, but an ‘act’, the very act of our own becoming. It is therefore self-education because the educational act lies not in a transmission from one subject to another, but in the realization of a new and fertile unity of the Spirit itself in its process of development. Gentile’s theory of the Spirit as pure act thus takes shape in his theory of the education of the Spirit, or rather of the self-education of the Spirit.

¹⁰ *Ibid.*

¹¹ *Id.*, *Sommario di pedagogia come scienza filosofica (1913-14)*, cit., p. 126.

¹² *Ibid.*, p. 131.

Gentile sees philosophy and pedagogy as coinciding, so there cannot be a pedagogy separate or distinct from philosophy. If pedagogy is «the science of the education of the spirit», or rather of the spirit's "self-education", it cannot fail to coincide «precisely with science or, in other words, with the philosophy of the spirit», meaning by science "every aspect of the spirit as freedom"¹³. From this identity, Gentile deduces a number of important consequences: the educational process is a unitary process in relation to which all the old distinctions – not only between authority and freedom, between teacher and learner, but also between teaching content and method – no longer apply. This makes all methodological and didactic problems pointless. There can be no distinction between form and content, between teaching method and subject matter, because every teacher develops his own method in the very act of teaching. There can be no method established a priori (as many education theorists have continued to believe). Gentile wanted to abandon the old teaching methods tied to the school subjects and focus on rediscovering the unity of the spirit and the unity of knowledge. The learner develops not according to any (assumed) laws of experimental psychology, but according to an inner law of the Spirit, the categories of which are subjectivity, objectivity and synthetic unity. These categories coincide with the forms of knowledge: art (a moment in the formation of subjectivity); religion and science (the moment of objectivity); and the fulfilling and perfecting form of knowledge that is philosophy (the moment of philosophical self-awareness). These three categories should be intended not as the main school subjects, but as overriding configurations of the process of human education. Through art, the spirit develops the experience of feeling, considered as the subjective or immediate moment in which the human being discovers the infinite wealth of its his energies. The aesthetic moment takes place dialectically in its opposite, in the moment of objectivity. The subjective experience is identified as transient and brings us back to the sense of necessity and of the law. Religion and science nurture this new experience. The maturity of the human being culminates, however, in the philosophical experience, where subjectivity and objectivity, art and religion, find their synthesis. As absolute forms of the Spirit in action, they are reconciled and blended in the Philosophy that thus embodies the fullness of spiritual life. As a consequence, a complete school education is the one provided by secondary academic education (*liceo*), which includes the study of philosophy. Ever since 1900, Gentile had voiced his conviction that «the spirit capable of moving in any kind of scientific research is the spirit trained by the classical school; and the essential element of this training, in accordance with the nature of the spirit, is the teaching of philosophy»¹⁴.

¹³ Id., *Del concetto scientifico della pedagogia*, cit.

¹⁴ G. Gentile, *L'insegnamento della filosofia ne' licei. Saggio pedagogico*, Palermo, Sandron, 1900, p. 160.

1.4. *The Gentile Reform of 1923*

The term *Riforma Gentile* is commonly used to indicate a whole set of decrees and norms issued in 1923 by Gentile as Minister for Education under the first Mussolini government. The framework of the new school system established a five-year course of primary-school education. This could be followed by a further three-year post-elementary course (that was abandoned in 1929), or a type of vocational school with more specifically professionalizing goals, both of which envisaged no further education thereafter. Secondary-level education included: five years at the *ginnasio* followed by three at the *liceo classico*, which gave access to all university faculties; a *liceo scientifico* lasting eight years in all (the first four originally completed at another institution), which only afforded access to university faculties teaching the sciences; a teacher-training college, with a seven-year course that gave access to a higher teacher-training institute, open to students of both sexes; a technical college with courses lasting eight years altogether, which only enabled students to access university courses at faculties of economics and trade, and statistical sciences. There were also two newly-established schools, a *liceo femminile* providing three-year courses for girls and a school for training infant-school teachers, neither of which gave access to any further education. The reform also established the institution of a *liceo artistico*, with a four-year course of studies preparatory to enrollment in the old academies, while largely confirming the old vocational (agrarian, commercial, industrial, nautical...) colleges. The whole professional training sector passed under the responsibility of the Ministry of Agriculture, Industry and Trade. The new school framework thus created a clear distinction between two types of education, one focusing on the humanities and the other on the sciences and technology. The various kinds of *liceo* were intended for those students who would continue their studies and then go on to become the ruling classes of the future, while the technical training colleges were for those who would go straight into employment.

Generally speaking, this school system devised by the reform seems consistent with Gentile's philosophical thinking. Primary school was mainly for teaching children to develop their artistic spontaneity (singing, drawing, dialect, poetry and popular traditions were taught to promote children's free expression). Secondary schools focused largely on the humanities, historically providing a rigorous education on the 'feats of the spirit'. University represented the synthesis of subject (expressiveness) and object (cultural content). The reform also introduced a number of novelties destined to profoundly change the way teaching was traditionally organized. The centralization of the management and control system was strongly reinforced, giving headmasters more ample powers. The methods for assessing students and for recruiting teachers became stricter. At secondary schools, the same teacher was assigned to teach various 'combinations' of subjects, so there were teaching posts for: Italian and Latin;

letters and history; Latin and history; mathematics and physics; history and philosophy; natural sciences, chemistry and geography; and philosophy and pedagogy. Within these combinations, History was essentially subordinate to Philosophy (and so was Pedagogy), while Physics was subordinate to Mathematics (because the experimental had to be inspired and tested by the theoretical-formal). The traditional 'class-based' teaching programs were replaced with 'examination programs', that – on paper at least – gave teachers the freedom to distribute the subject matter over the various years of a course as they saw fit.

From the cultural standpoint, the importance of a knowledge of the classics and humanities (classical and modern literature, history and philosophy) was strongly emphasized. They dominated the curriculum at all the various types of secondary school – from the *ginnasio* and *liceo classico* to the *liceo scientifico*, but also at the teacher-training and technical colleges. This dominance of subjects in the sphere of the humanities and literature (defined as 'formative') over the technical-scientific subjects (which were 'informative') led, for instance, to Latin being introduced at most middle schools. The *ginnasio* and *liceo classico* provided the main supporting structure for the whole school system envisaged by the reform, and a privileged route towards a place among the country's future ruling classes. It was reorganized to assign ample space to the humanities, interpreting scientific knowledge in a cultural sense, not in terms of any acquisition of practical skills. Even at the teacher-training colleges (a new type of school for training primary-school teachers), priority was given to the study of literature and philosophy, and all forms of methodological, didactic or professional training were omitted.

Of course, the main promoters of the new school system also revised the content of the school programs, especially for some of the fundamental topics like Italian literature, Latin, Greek, history – and philosophy. On top of everything came the study of philosophy, or rather of the history of philosophy. Just as the Spirit is actuated in the three previously-mentioned dialectic moments, education cannot be complete if it remains only literary and cultural (as this would imprison the learner in his own subjectivity) or if it is only religious or scientific (since they would suffocate the life of the subject, absorbing it in an object that transcends it, be it God or the physical world of Nature). A complete education is one that culminates in a philosophical experience, where subjectivity and objectivity, art and religion find their synthesis in a speculative reflection of the subject, who becomes object, and of the object that becomes subject – or, in other words, in the dimension of the spiritual act. Only Philosophy is critical and systematic. It does not envisage any premises. It wonders about what the object *is* (critical) and attempts to find the answer in its universality (system). It solves every opposition between subject and object in the dialectic synthesis. Philosophy as self-awareness of the Spirit, of all Reality in its historicity, comes to be identified with the History of philosophy. They

are both the same philosophizing in action and in a concrete sense: the story of the perpetual life of Thought and its making. Just as the Spirit is the history of itself, so too is philosophy the history of philosophy. A history identical with philosophy is general history, the object of which is the productivity of the Spirit in general. Thus, according to Gentile, it is in the history of philosophy (not only of philosophy specifically, but of the philosophy immanent in every spirit) that the whole history of humanity is contained. So we can only philosophize within a conscious participation in the whole realization of Thought. That is why Gentile Reform took a largely historical approach to the study of philosophy and other subjects at school.

It seemed essential to be familiar with the classics. The purpose of studying exemplary works and authors of the past was to enable students to discover for themselves their own humanity (or their own spirit as a moment of the absolute Spirit, as Gentile would have put it). Gentile had repeatedly proposed reading the classics directly, rather than learning from the schoolbooks. He wrote: «In a teacher's explanation in a textbook we find a digested version of the doctrine, but in the classic work we find the doctrine itself in the making; and this is what really benefits the spirit of the learner»¹⁵. In this frame, the reform acknowledged the value of religious culture and made the teaching of religion compulsory at primary school. This was judged necessary to bring younger children into contact (albeit in a subordinate role vis-à-vis that of philosophy) with one of the most typical and profound expressions of our civilization, and one of the founding elements of our spiritual tradition¹⁶. In short, since it was obviously impossible to develop a philosophical self-awareness in all those attending State schools, religious tradition was entrusted with the task of making the lower classes feel part of a country to which the historical and cultural identity of Catholicism had given a fundamental contribution.

At the end of every course of secondary education, the reform demanded a 'state examination', to be conducted by a commission appointed by the Ministry, and consisting of people from outside the school. The examination had to be taken by students attending all State or private schools. A strong emphasis was placed on the school system's selective function. The introduction of a rigid system of entry, intermediate and final examinations was designed to identify the best students and contain the number of classes and schools¹⁷. According to

¹⁵ G. Gentile, *L'insegnamento della filosofia ne' licei*, Palermo, Sandron, 1900, p. 151.

¹⁶ According to art. 3 of the Royal decree of 1.10.1923, n. 2185, «As the founding and crowning element of (elementary) education at every level, there is the teaching of Christian doctrine in the accepted form of Catholic tradition». The teaching of religion was extended to all types of school after the Concordat stipulated between the Italian State and the Holy See in 1929.

¹⁷ This decision to have «few, good schools» was shared by many other exponents in the world of culture and politics at the time, as well as Gentile, including Gaetano Salvemini and Piero Gobetti. They all agreed on the urgent need for a profound reform of the Italian school system due to decline in the quality of the education it provided in the years during and immediately after the First World War. It was clear that previous legislation had become obsolete, and most of the

Gentile, the number of State schools needed to be reduced in order to improve their quality. He wanted to develop in every sense an elite school that could always compete with the private schools, finding in itself the energy for its ongoing renewal and the achievement of ever-higher quality levels.

Deep-seated in the reform was a strenuous effort to reconcile two contrasting needs: for complete freedom in the provision of education as a spiritual act; and for strict discipline and subordination of this schooling to the values of the State, seen as an ethical State. The irrepressible right to the free expression of the spirit and the personality of teachers and students could make it difficult to leave space for spontaneous experiences or those forms of 'atomistic and libertarian individualism' criticized by exponents of some ideological orientations of the time, such as the activist movement. These pedagogical approaches were essentially accused of confusing the autonomy of the personality with the freedom of choice of an individual detached from the history in and of which he lives, and from the tradition that had always been the principal source of nourishment for individual activity. In Gentile's view, the classical tradition was the most profound and original tradition of the Italian people, and to abandon it would have meant renouncing their concrete historical identity. The education of genuinely alive and creative personalities therefore focused on drawing their strength from sinking their spiritual roots in the humus of their own past, with which they form an inseparable entity, and interiorizing the nation's values by concretely adopting the objectives dictated by the State.

Historiographical investigations have often paused to investigate these topics, and particularly the relationship between the neo-idealist inspiration behind Gentile Reform and the fascist regime that managed it for 20 years. Less attention has generally been paid to the reason for its extraordinary longevity. Developed in the early years of the 20th century in a social milieu far removed from the processes of modernization, the reform succeeded in educating a ruling class that enabled Italy to move rapidly into the modern world, especially in the latter post-war years. The historical question that remains is whether all this happened despite Gentile Reform, or whether a general classical culture focusing on the humanities, and its deployment in the various types of school, had a staying power and an educational potential that went beyond (and possibly departed from) the reformer's intentions. To answer these fundamental questions, however, it would be necessary to conduct more detailed and in-depth investigations, also of a comparative nature.

teachers hurriedly recruited to cope with the sudden increase in the number of children registering to attend school were ill-prepared for the job.

2. *The reception of Gentile in Spain*

2.1. *Before the Civil War*¹⁸

The influence of Giovanni Gentile and his *attualismo* on Spanish pedagogy seems to have been quite limited in the first third of the 20th century. The core of Spanish pedagogy during this period had as its principal references France – in the political realm – and Germany – in the more strictly pedagogical domain –, while at the same time it was open to the New Education of North America¹⁹. This is not to suggest that Gentile was not known, or that Spain did not have its share of adherents to his radically philosophical conception of pedagogy. For the most part, however, the more philosophical pedagogical postures tended to nurture themselves directly from Germany.

Interest in Gentile's pedagogical conceptions appears to have been greater in Catalan pedagogical circles than in those of Madrid²⁰. The cultural project of Catalan conservatism linked to the Italian artistic movement "Novecento" – inspired by classical equilibrium and the Mediterranean tradition – was far more receptive to Italian tendencies than were the intellectual circles of the Spanish capital, where Germanic traditions held sway. In 1916, Eugeni d'Ors, the intellectual leader of conservative catalanism, offered a monographic course on Gentile in the pedagogical institution created by the regional government²¹. This early interest in the Italian educationalist endured; in 1930 the Pedagogy Seminar of the University of Barcelona invited Gentile, although the visit never came to fruition²². The markedly philosophical aspect of Gentile's pedagogy was a good match for the formation of Catalunya's foremost educationalist, Joaquim Xirau, while his *attualismo*, according to Angel Moreu, influenced thinkers such as Joan Roura-Parella, interested in a pedagogy conceived of as a science of the spirit, one that could bring together positivist or experimental pedagogy with the normative pedagogy of the neo-Kantians²³.

¹⁸ After the submission of this article to the journal, a new article has been published that is relevant to the topic: I. Vilafranca, C. Vilanou, *La pedagogía católica italiana: entre el positivismo y el neidealismo. Notas sobre su presencia en España (1870-1968)*, «Historia de la Educación», n. 39, 2020, pp. 249-311.

¹⁹ For an excellent panoramic overview of these international influences, see J.M. Fernández Soria, *Influencias nacionales europeas en la política educativa española del siglo XX*, «Historia de la educación», n. 24, 2005.

²⁰ J. García, I. Vilafranca, C. Vilanou, *La recepció de la filosofia de l'educació de Giovanni Gentile: del neidealisme al neoespiritualisme*, «Educació i Història», n. 27, 2016, pp. 211-212.

²¹ C. Montaner, *La pedagogia en els cursos monogràfics d'alts estudis i d'intercanvi. La pedagogia de Giovanni Gentile*, «Quaderns d'Estudi», vol. 1, n. 1, 1916, pp. 25-32.

²² García, Vilafranca, Vilanou, *La recepció de la filosofia*, cit., p. 191.

²³ A.C. Moreu, *La recepción española de la pedagogía positivista italiana*, in J.M. Hernández Díaz (ed.), *Influencias italianas en la educación española e iberoamericana*, Salamanca, FahrenHouse, 2014, p. 132.

However, we should exercise caution when evaluating Gentile's reception in Barcelona, given how even the proponents of his ideas harbored serious reservations. The course given by Eugeni d'Ors provides us with an examples of the discrepancies that inevitable arose; the free, indetermination of the spirit and ensuing self-education were hardly going to be embraced by the cultural project being promoted by Catalan institutions, rooted in a clear opposition to the Romantic heritage and its spontaneism²⁴. And while it is true that the first monographic article on Gentile to be published in Spain appeared in Barcelona – and in Catalan – it is also true that the arguments made in this text were diametrically opposed to those of Gentile's²⁵, consisting of a long review of the book by Father Chiocchetti – originally published in Italy – specifically refuting the educationalist's theses²⁶. Furthermore, the dialog that Alexandre Galí held with Gentile, based on a reading of *La riforma dell'educazione*, has as its premise the rejection of Gentile's ideas. Two years later, the same author defended pedagogical technique, in opposition to the Gentilian reduction of the educational act to an *art*²⁷. Thus, the three references found in the literature on the reception of Gentile in Barcelona point to a markedly critical reception, all of them expressing an explicit rejection of his postulates.

Gentile's influence on the principal current of Spanish pedagogy, based in Madrid, was even more modest. Only five of his articles were published in Spain. The first of these was *Identidad entre la Filosofía y la Pedagogía* [Identity Between Philosophy and Pedagogy]²⁸, a translation – most likely done by Modesto Bargalló²⁹ – of an extract from his *Sommario di Pedagogia come scienza filosofica*. The fact that the «Revista de Escuelas Normales» included this article in its first issue could be construed as the journal's way of signaling its approval. The second article to appear in Spain was *La misión del maestro en la escuela renovada* [The schoolteacher's mission in the reformed school], which was published in the prestigious «Revista de Pedagogía»³⁰. Four years later, in 1930, the «Boletín de la Institución Libre de Enseñanza», the other great pillar of Spanish pedagogy, published two new articles. The first of these, dealing

²⁴ García, Vilafranca and Vilanou, *La recepció de la filosofia*, cit., pp. 211-212.

²⁵ J.M. Capdevila, *La filosofia di Giovanni Gentile, per Emili Chiocchetti*, «Quaderns d'Estudi», n. 54-55, 1923.

²⁶ E. Chiocchetti, *La filosofia fi Giovanni Gentile*, Milano, Vita e Pensiero, 1922.

²⁷ A. Galí, *Forma i materia en educació*, «Criterion», vol. 2, n. 4, 1926, p. 168, cited in García, Vilafranca, Vilanou, *La recepció de la filosofia*, cit., pp. 211-212. A. Galí, *La medida objetiva del trabajo escolar*, Madrid, Aguilar, 1929, p. 26, cited by J.M. Mainer, *La forja de un campo profesional. Ideología y didáctica de las Ciencias Sociales en España (1900-1970)*, Madrid, Consejo Superior de Investigaciones Científicas, 2009. [Original edition in Catalan: *La mesura objectiva del treball escolar*, Barcelona, Material Escolar i Científic, 1928].

²⁸ M.B., *Identidad entre la Filosofía y la Pedagogía, según Giovanni Gentile*, «Revista de Escuelas Normales», n. 1, 1923.

²⁹ García, Vilafranca, Vilanou, *La recepció de la filosofia*, cit., p. 205.

³⁰ G. Gentile, *La misión del maestro en la escuela renovada*, «Revista de Pedagogía», n. 55 and n. 56, 1926.

with physical education and character, had previously been published in the *Enciclopedia de la Educación* of Montevideo, from where it was reproduced; the second was the translation of a speech given by teachers in Trieste³¹. Finally, in December 1932, the journal «La Escuela Moderna» published *El prejuicio del pedagogismo y al pseudoconciencia de los métodos* [The prejudice of pedagogism and the pseudo-awareness of methods]³², consisting of the translation of another part of his *Sommario*. As we can see, Gentile saw very few of his texts published in Spain, and those that did appear were quite limited thematically: two were translations of his classic work while the other three dealt with the educationalist's conceptions. Be this as it may, the publication in Spain's principal journals of a mere five articles by someone of his stature would seem to attest to his rather limited influence on Spanish pedagogy.

Obviously, Gentile was known in Spain, especially after he was named Minister. References to his reform in 1923 – favorable for the most part – can be found in various pedagogical journals, an example being those published in the «Revista de Escuelas Normales» by the teacher of the normal school in Valladolid, María Victoria Jiménez³³. In contrast, the references to his pedagogical ideas were much scarcer and considerably more critical. In October of 1922, the same month he was named Minister, Modesto Bargalló appealed to Gentile to defend the study of the human spirit³⁴, leading to a rapport reflected shortly afterwards in Bargalló's translation cited above in January, 1923. But any apparent affinity was rather limited. The Argentinian educationalist Juan Montavani was much more critical, expressing in 1932 in the pages of «La Escuela Moderna» a frontal rejection of the notion of pedagogy's subsumption by philosophy and denouncing the «fallacious monism» of Gentilian thought³⁵. In a similar vein, Hugo Calcetti declared in 1933 that «the Gentilian thesis is inadmissible, under any circumstances»³⁶. Gentile himself was not even the principal object of either of these articles; rather, among a broad range of positions being discussed, he was identified in them as representing the extreme of the philosophical position.

The scarce number of articles by Gentile and the criticism leveled at his ideas attest to the fact that Italy did not constitute a reference for the Madrid-based nucleus that would establish the canon of pre-war Spanish pedagogy. Montessori

³¹ Id., *La educación física y carácter*, «Boletín de la Institución Libre de Enseñanza», n. 839, 1930 and *El concepto moderno de la ciencia y el problema universitario*, n. 845 and n. 846, 1930.

³² Id., *El prejuicio del pedagogismo y al pseudoconciencia de los métodos*, «La Escuela Moderna», n. 495, 1932.

³³ M. Victoria Jiménez, *Impresiones pedagógicas de Italia*, «Revista de Escuelas Normales», n. 28-29 and n. 30, 1925, and *La reforma italiana*, «Revista de Escuelas Normales», n. 55, 1928.

³⁴ M. Bargalló, *Sobre el concepto de pedagogía*, «Boletín de Escuelas Normales», n. 6, 1922.

³⁵ J. Mantovani, *El problema de la educación. Fundamentos, significado y contenido en los tiempos actuales*, «La Escuela Moderna», n. 459, 1929, p. 547.

³⁶ H. Calcetti, *Educando y educador. La razón educativa en los sistemas didácticos contemporáneos. (Continuación.)*, «La Escuela Moderna», n. 502, 1933, p. 329.

herself did not even attract great interest in Madrid – in contrast to Barcelona, where for four years she worked for the Catalan regional government³⁷. The generation of '14 that was to define Spanish thought at the time did not look to Italy but rather to Germany. Their leader, Ortega y Gasset, along with his disciples such as María de Maeztu or Fernando de los Ríos, had discovered in Natorp a comunitarianist perspective that transcended traditional French republicanism and allowed for the postulation of a non-Marxist, humanist socialism³⁸, one based on an ethical reform achieved through education, as the traditional Spanish Krausism defended³⁹. Kerchensteiner, meanwhile, represented the culmination of the search for pedagogical reform by the New Education adherents in Spain. Germany's appeal was even greater in the case of Lorenzo Luzuriaga, probably the preeminent pre-war educationalist as well as the editor of the great journal at the center of Spanish pedagogy, the «Revista de Pedagogía»⁴⁰.

It was this journal that served as the main vehicle for connecting Spanish pedagogy with the international sphere. In addition to the journal itself, the editorial staff published a collection of books of divulgation, including translations of outstanding international authors. The «Revista de Pedagogía»'s preference for Germany was evident. The prominence given to educationalists such as Petersen (8 articles) and Kriek (4 articles) was complemented with collaborations by the North American Kilpatrick (5 articles)⁴¹. Luzuriaga affirmed vehemently that «German pedagogical production has, since the 18th century, been unrivaled by any other people»⁴². This is not to say that he did not acknowledge the importance in international pedagogy of Italy, which he placed alongside the United States and a group of «countries that are in the lead in contemporary pedagogy». Luzuriaga cited Gentile and Credaro but made no special mention of Montessori.

³⁷ M. Sáiz y D. Sáiz, *La estancia de María Montessori en Barcelona: la influencia de su método en la psicopedagogía catalana*, «Revista de Historia de la Psicología», vol. 26, n. 2-3, 2005, p. 205.

³⁸ C. Martínez Valle, *La recepción de Natorp por los pensionados de la JAE (1906-1916): revisionismo republicano del socialismo, elitismo político y educativo, y escuela unificada*, «Foro de Educación», vol. 16, n. 25, 2018; C. Vilanou, *Pensamiento y discursos pedagógicos en España (1898-1940)*, in J. Ruiz Berrio (ed.), *La Educación en España a examen (1898-1998)*, Madrid, Ministerio de Educación y Cultura, 1999, p. 34. Fernández Soria, *Influencias nacionales europeas*, cit., pp. 63-65.

³⁹ Para una aproximación en inglés al krausismo, A. Gómez Rodríguez, *The 'Social Contract' for Spanish Science before the Civil War*, in A. Gómez, B. Balmer, A.F. Canales (edd.), *Science Policies and Twentieth-Century Dictatorships. Spain, Italy and Argentina*, London, Routledge, 2016, pp. 31-33.

⁴⁰ A. Viñao, *La modernización pedagógica española a través de la «Revista de Pedagogía» (1922-1936)*, «Anales de Pedagogía», vol. 12, n. 12, 1994-1995.

⁴¹ E. Mérida-Nicolich, *Índice de la Revista de Pedagogía (1922-1936)*, Pamplona, Eunsa, 1983.

⁴² L. Luzuriaga *La Pedagogía, estudio universitario*, «Boletín de la Institución Libre de Enseñanza», March 21, 1921, p. 20.

Despite this recognition by the director, the presence of Italian pedagogy in the leading Spanish pedagogical journal was negligible. What's more, the focus, rather than on Gentile, was placed on his close collaborator, Lombardo-Radice, whom Luzuriaga and his group held in considerably greater esteem, evidenced by the fact that during the 1920s they published three articles of his⁴³. This preference was common in the «Revista de Escuelas Normales», which in its praises toward Italy invariably cited Radice far more than Gentile. Radice's advocates in Spain were two women: in the «Revista de Escuelas Normales» it was the above-mentioned normal school teacher María Victoria Jiménez, who translated his book *La reforma escolar* [The School Reform]; in the «Revista de Pedagogía» it was the teacher Concepción Sainz Amor, who in 1928 translated his book *Líneas generales de Filosofía de la Educación* [General Lines of Philosophy of Education] for the journal's publisher.

In contrast, texts focusing on Gentile as the principal object of interest during the 14 years of the «Revista de Pedagogía» were scarce indeed. In April 1923 the journal offered a commentary on an article directed at teachers and published in the Italian journal *Levana*⁴⁴. Two months later, Joaquim Xirau, the principal Catalan educationalist referred to above, published an admiring review of Gentile's book *Educazione e Scuola Laica*⁴⁵. The Italian's principal advocate in the journal, however, was Orencio Muñoz, lawyer, teacher and later, school inspector. In his first article, from 1924, Muñoz lamented the absence of publications on Gentile (he was unaware of the translation in the «Revista de Escuelas Normales»)⁴⁶ and he set out to fill this void. In the following decade he published six more works on Gentile along with an article, titled *Filosofía y Pedagogía* [Philosophy and Pedagogy], inspired in his ideas in 1936⁴⁷. This work of divulgation culminated with the translation and publication in the collection «Contemporary Pedagogy» – by the journal's publisher – of Gentile's first book in Spain, *El ideal de la educación* [The ideal of education]. In this way, Gentile joined the select club of contemporary references, as defined by the leaders of Spanish pedagogy, and took his place next to the likes of Dewey, Kerchensteiner, Clapàrede, Wyneken, Decroly, Stern, Montessori, Lombardo-Radice, Ferrière and Spranger. This represented quite an achievement for the philosopher (and for Italian pedagogy, which could now claim to constitute a fourth of the authors in this small group). But it was too late.

⁴³ J. Lombardo-Radice, *Consejos a los maestros*, «Revista de Pedagogía», n. 52, 1926; Id., *La falsa libertad y la libertad verdadera*, «Revista de Pedagogía», n. 70, 1927; and Id., *El folklore y la educación de los niños en Italia*, «Revista de Pedagogía», n. 81, 1928.

⁴⁴ MC, *Informaciones. Educación y Libertad, Según G. Gentile*, «Revista de Pedagogía», n. 20, 1923, pp. 310-312. Vilanou suggests that MC was Margarita Comas (206), although it could also be Manuel Cardenal, secondary school teacher in Segovia.

⁴⁵ J. Xirau, *Giovanni Gentile: Educazione e Scuola laica*, «Revista de Pedagogía», n. 22, 1923.

⁴⁶ O. Muñoz, *Giovanni Gentile*, «Revista de Pedagogía», n. 26 and n. 27, 1924.

⁴⁷ Id., *Filosofía y pedagogía*, «Revista de Pedagogía», n. 170, 1936.

As fate would have it, the book's publication in July of 1936 was followed just a few days later by the outbreak of the Civil War, after which Spanish pedagogy was effectively dismantled. All of the institutions undergirding it were shuttered, from journals to university courses, while both its Madrid-based nucleus and its leaders in Catalonia were sent into exile. In all likelihood, Orencio Muñoz was one of the exiled, as the only trace we find of his person are references to his intense activity as a translator in Mexico beginning in 1944⁴⁸. The first book of Gentile's published in Spanish may as well have vanished into thin air; it is not to be found in any Spanish university library nor in the library of the Residencia de Estudiantes, suggesting that it never did make its way into the Museo Pedagógico Nacional. Even more surprising is the fact that it cannot be found in the Biblioteca de Catalunya or in any other libraries in the region where his work had been relatively well-received. There is one copy, in the Biblioteca Nacional of Madrid, which may well be the sole volume, as it does not figure in the catalogs of any libraries in Argentina or Mexico either. The book's virtual disappearance is significant and does not seem to be attributable solely to the war-time situation; Raymond Buyse's *La experimentación en pedagogía* was published during the war, in the revolutionary Barcelona of 1937⁴⁹, and was nonetheless widely read and disseminated in Franco's post-war Spain. Whatever the causes, the only book by Gentile published in Spanish met with sudden oblivion. It was not until the mid-1940s, in Buenos Aires, that two of his works were translated into Spanish: *Los fundamentos de la filosofía del derecho*, in 1944, and the *Sumario de pedagogía como ciencia filosófica: pedagogía general*, in 1946⁵⁰.

2.2. Gentile and the Francoist camp

The oblivion into which Gentile's book fell brings into question the supposed influence that, according to Spanish historiography, he exercised on Francoist educational policy and, more specifically, on the 1938 law of Secondary Education⁵¹. However, this contradiction is more apparent than real. First of all,

⁴⁸ See: <https://catalogo.iib.unam.mx/F/E1RESY9BPHF4NH1ECNIAN3X8RI7C4JGCC2SMAJE2NAIINYB3G2-04906?func=scan-heading&acc_sequence=000066138> (last access: 9.09.2020).

⁴⁹ R. Buyse, *La experimentación en pedagogía*, Barcelona, Labor, 1937.

⁵⁰ G. Gentile, *Los fundamentos de la filosofía del derecho*, Buenos Aires, Losada, 1944; G. Gentile, *Sumario de pedagogía como ciencia filosófica: pedagogía general*, Buenos Aires, El Ateneo, 1946.

⁵¹ A. Alted, *Política del Nuevo Estado sobre el patrimonio cultural y la educación durante la guerra civil española*, Madrid, Centro Nacional de Información Artística, Arqueológica y Etnológica, 1984, p. 194. Fernández Soria, *Influencias nacionales europeas*, cit., pp. 91-92; Morente, *Los fascismos europeos*, cit.; J.R. López Bausela, *La contrarrevolución pedagógica en*

it is important that we distinguish between the influence of Fascist educational policies and the influence of Gentile and his reform (which are two different things). The lack of such a distinction between these two elements has been a permanent source of confusion in Spanish historiography, less in the case of monographic studies⁵² than in more generalist contexts. Fascist educational policy encompasses a broad spectrum of revolutionary phenomena, from the party's youth organizations and extreme ideologization to racial segregation in schools. Gentile's reform, on the other hand, affected a much more limited domain: that of the reordering of the educational system. But we should also make a distinction between the Gentile Reform and his pedagogical ideas. This distinction is especially relevant for Spanish National-Catholicism. As J. M. Hellín made perfectly clear in his 1927 review of Chiocchetti's book in the influential Jesuit journal «Razón y Fé», Gentile's philosophy «is not only a philosophy diametrically opposed to ours; precisely because of this, it is a philosophy that tends to destroy faith and substitute religion»⁵³. The Gentile that may possibly have had an influence in Francoist Spain was not the philosopher but rather the minister responsible for establishing the initial framework for the Fascist educational policies and the reform of 1923.

Yet even circumscribed to this political realm, the alleged influence of Gentile on the victors of the Spanish Civil War is questionable. The combative Spanish Catholic educational sector had its own reform project – defined well before the war –, one in which Gentilian ideas did not figure at all and in which the Italian educationalist did not constitute so much as a reference. Consequently, Gentile was in no way the source of inspiration for National-Catholic monarchists who were to convert this Catholic program into law. In fact, neither the minister Sainz Rodríguez nor his close collaborator, José Pemartín – who oversaw secondary education – made so much as an allusion to the philosopher. Neither did Romualdo de Toledo, in charge of primary education. Toledo, in an overview from 1939 of educational legislation from different countries and its degree of support for families' rights, put Italy in eighth position and defended only the measures put in place by Credaro⁵⁴. While it is true that Toledo was a traditionalist, Gentile did not get much more attention from a fervent Fascist such as the school inspector Alfonso Iniesta either. For Iniesta, a firm supporter of the Carta de l'Scuola de Bottai and the military organization of youth, the

el franquismo de guerra, Madrid, Biblioteca Nueva, 2011, p. 239 and *La escuela azul de Falange española de las JONS*, Madrid, Dykinson, 2017, pp. 67-70. A.F. Canales, *El bachillerato en los años cuarenta: la victoria católica*, in A.F. Canales, A. Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, Madrid, Biblioteca Nueva, 2015, p. 106.

⁵² For a monographic study, see the excellent work by Morente, *Los fascismos europeos*, cit.

⁵³ J.M. Hellín, *Emilio Chiocchetti, O.F. La filosofía de Giovanni Gentile*, «Razón y Fé», vol. 79, 1927.

⁵⁴ *VII Semana de Educación Nacional*, «Atenas», n. 87-88, 1939.

Gentile Reform was little more than a provisional stage and of limited interest. He saw it as being «based on a mistaken conception of limited reach, infused with cultural and idealist concerns and lacking in political [considerations] and in strictly Catholic religious concerns»⁵⁵. In fact, not even the Spanish Fascists who had been defeated by the Catholic sector in their struggle for control of education defended Italy's first Fascist education minister. In the collaborations dealing with Italian education published in the journal of the single-party teacher organizations, *Servicio*, Carlos Consiglio, subdirector of the Instituto de Cultura Italiana en España, shares Iniesta's views⁵⁶. In another key pedagogical work of the Falange, *Revolución y Educación*, by the school inspector Maíllo, Gentile was not even cited⁵⁷.

The similarities between the Gentile Reform of 1923 and the Francoist reform of 1938 are obvious. Both advocated a markedly elitist, selective secondary education, focused solely on preparation for entry into the university. A non-fragmented curriculum of seven courses was established, one without a science/humanities specialization but with a considerable predominance of classic humanities, all of which culminated in a final exam (State Examination)⁵⁸. At the same time, the new regime closed half of all of the academic secondary schools that existed before the war. It may seem plausible, then, to extrapolate the influence that Italian Fascism had on many other aspects of Franco's regime to that of educational policy and to detect a direct Gentilian imprint in the Spanish reform of 1938. But the double analogy is illusory.

In the first place, we cannot fairly speak of the influence of the Gentile Reform when this reform was only received in Spain in a notably partial and sectorial way. As indicated above, the main core of Spanish pedagogy hardly made mention of it, while its Catholic opponents did not seem to see much more in it than the establishment of compulsory religion. The generalist Catholic press applauded the measure, from the Madrid-based *El Debate*⁵⁹ to the remote *Gaceta de Tenerife*⁶⁰. Even the more specialized Catholic publications appeared to reduce Gentile's complex and ambitious reform to this issue, as is revealed in the well-documented review that Félix Restrepo published in «Razón y Fé» on secondary school reform in Europe⁶¹. The Italian José (Giuseppe) Monti,

⁵⁵ A. Iniesta, *El Orden Nuevo en la educación de juventudes*, Madrid, El Magisterio Español, 1941, pp. 50 and 52.

⁵⁶ C. Consiglio, *La Enseñanza en Italia. La Carta de la Escuela*, «Servicio», n. 5, 1942.

⁵⁷ A. Maíllo, *Educación y Revolución*, Madrid, Editora Nacional, 1943.

⁵⁸ J.M. Alfonso Sánchez, *La actuación de la Iglesia Católica en la legislación educativa española: Leyes de enseñanza media de 1938 y 1953*, Madrid, FUE, 1999, pp. 57-90; López, *La contrarrevolución pedagógica*, cit., pp. 232-243 and J.A. Lorenzo Vicente, *La enseñanza media en la España franquista (1936-1975)*, Madrid, Editorial Complutense, 2003, pp. 75-81.

⁵⁹ *Lo de hoy. Gentile a favor de religión*, «El Debate», November 21, 1923.

⁶⁰ XX, *La educación de los hijos es un problema de capital importancia*, «La Gaceta de Tenerife», November 25, 1925.

⁶¹ F. Restrepo, *Cómo se hace una reforma de la enseñanza*, «Razón y Fé», vol. 68, 1924, p. 300.

celebrated the fact that a «pantheist and idealist» philosopher should have taken this measure making religion mandatory⁶². But even on a matter such as this, religion in school, the differences between the approach of the Spanish Catholics and Gentile soon became apparent, as evidenced by the rejection expressed by Manuel Grana in the pages of *El Debate* to the assignation of teachers to give religion classes⁶³. This opposition, voiced in the post-war period, bewildered Francoist authorities⁶⁴.

In the Europe between the World Wars, the defense of a traditional, university-oriented secondary education was not only espoused by Gentile; many sectors defended this approach from a broad diversity of ideological, philosophical and pedagogical positions. Nor was Gentile the principal reference in his Catholic vindication of the classical humanities in Spain. Arturo M. Cayuela, the tireless apostle of Latin in Spain, did not mention him⁶⁵, while his Jesuit colleagues Ignacio Errandonea and Enrique Herrera Oria took as their principal international reference England – Cambridge and Oxford along with its Public Schools⁶⁶. While it is true that Herrera Oria expressed his admiration for the classical *Liceo*, he did so in a monographic article dealing with Italy⁶⁷. Neither Gentile nor Italy constituted prominent references in the Catholic pedagogical journal «Atenas»⁶⁸. In his famous article labeling the secondary reform of 1938 «the best-delivered blow inflicted on the anti-Spanish and anti-Christian revolution», the Jesuit Herrera Oria cited England before Italy⁶⁹. In another widely shared text, José Permatín, who was directly responsible for the reform, choose for his spirited defense of Latin to appeal to the figure of José Antonio Primo de Rivera, the leader of Spanish Fascism executed by the Republicans during the Civil War⁷⁰.

⁶² J. Monti, *La reforma Gentile*, «Escuela Moderna», vol. 53, n. 1, 1931, p. 19.

⁶³ M. Grana, *El catecismo en las escuelas. ¿Quién debe enseñarlo?*, «El Debate», June 13, 1923.

⁶⁴ See J.M. Alonso Sánchez, *Iglesia y Estado*, Madrid, Fundación Universitaria Española, 1999, p. 83 and A.F. Canales, *Pemartín y la frustrada fascistización de la enseñanza media de posguerra*, «Historia Social», n. 74, 2012, pp. 73-74.

⁶⁵ A.M. Cayuela, *Confesión paladina del error pedagógico Nacional*, «Razón y Fé», vol. 93, 1930.

⁶⁶ I. Errandonea, *Más sobre los clásicos. Religión y patria (I)*, «Razón y Fé», vol. 78, 1927. E. Herrera Oria, *Cómo educa Inglaterra*, Madrid, FAE, 1932, cap. VI; I. Errandonea, *El bachillerato clásico en España*, «Atenas», n. 71-72, 1937.

⁶⁷ E. Herrera Oria, *Orientaciones de los estudios secundarios en Italia*, «Razón y Fé», vol. 83, 1928.

⁶⁸ *Vuelta atrás*, «Atenas», n. 10, 1931; J. Fantini, *Hacia un nuevo bachillerato*, «Atenas», n. 54, 55 and n. 56, 1935; G., *Más sobre la enseñanza del Latín*, «Atenas», n. 54, 1935.

⁶⁹ E. Herrera Oria, *La reforma de la Educación media en la España Nacional*, «Atenas», n. 84, 1938.

⁷⁰ J. Pemartín, *Formación clásica y formación romántica*, «Atenas», n. 104-105, 1940, p. 180.

One novelty included in the 1938 reform did suggest a nod to Gentile: the introduction of the State Examination, a denomination copied from the Italian's reform. This exam represented the keystone of the Spanish Catholic program. In fact, all of the other provisions and measures depended directly on it. And yet, once again, the coincidence goes no deeper than the surface. To understand the importance of the State Examination in the Francoist reform we need to recall the importance of exams in the regulation of the Spanish school system. At the start of the century the Liberals had established official examinations as their principal mechanism for controlling private schools, which were mostly religious. Students from these private schools were required to take exams annually in the public secondary schools, exams that were administered by the public secondary school teachers. This is why the central debate about examinations in Spain was closely linked to the debate about the control of the Church's schools by public teachers. Paradoxically, this situation could even give the impression, at first glance, that these schools were defending surprisingly progressive pedagogical positions.

Exams constituted the pillar of the Catholic program, this being the issue that determined their position with regard to other elements susceptible to debate. Of first concern was the number and location of exams that the Church was willing to accept. Unlike today, at the time, the idea of obtaining a public certificate such as that of the Baccalaureate without the involvement of a tribunal made up of public civil servants was simply not contemplated. Not even in the context of the post-war euphoria following Franco's victory was the Church bold enough to suggest such a step. Given, then, that they were stuck with the public tribunal, the lesser evil opted for by the Church was to limit their compliance to one single exam, programmed for the final year of secondary school, thus requiring that all of the tribunal members be university professors (the lesser evil) and not secondary school teachers (the absolute evil). This preference for a single, final exam led the Church to oppose the idea of an elementary title, equivalent to the Italian *ginnasio*, that offered a first certificate at the age of fourteen. Whereas Gentile had his own arguments against the hybrid or multi-functional school, in Spain the rejection to this first, separate educational stage was merely pragmatic. A first stage of secondary education would imply facing the issue of how to carry out an evaluation and, more specifically, how to justify a commission or tribunal that was not composed of public secondary school teachers. This explains the decision to establish a single, university-oriented curriculum of seven years. Once again, beyond the Gentilian preference for academic elitism, it was the university orientation of this model that justified converting the final examination into a university entrance exam, one that was firmly in the hands of university professors.

This model really had nothing to do with the system of exams introduced by Gentile nor with his controversial State Examination. As Herrera Oria himself acknowledged, not only were there intermediate exams in Italy, but

the examining commission itself was made up mostly of secondary school teachers⁷¹. This transcendental difference explains why Italy had not constituted an international reference in this regard for Spanish Catholics before the war. In 1924, shortly after the Gentile Reform, the Jesuit Félix Restrepo had not paid particular attention to Italy in his somewhat rambling overview of European systems, in which he criticized the exceptional Spanish system of exams⁷². José María del Barrio went even further in his criticism in 1926, arguing that the secondary exam had been discredited outside of Spain and that countries such as Germany and Austria had already done away with it⁷³. Even more significantly, in 1935 Herrera Oria pointed to the despised French Republic as the model for examining academic maturity⁷⁴. As paradoxical as it may seem, there is nothing surprising about this lack of interest in Italy, as the only thing the Spanish State Examination shared with that of Gentile was its name. In introducing this exam, the Franco Regime was in no way striving to achieve some Gentilian rigor; rather, it was devising a way to free the Church's schools from the control of the state.

At the same time, the Franco Regime carried out a radical reduction of school capacity. In 1939 a full half of the academic secondary schools existing before the war were closed⁷⁵, a measure that could be seen as the culmination of Gentile's restrictive ideal, but which he had not been able to implement in Italy. This massive closure led to an exponential growth in the establishment of religious schools in the following two decades, albeit with no control whatsoever in terms of their quality, as the regime did not even bother to enforce its own policies and laws. The results proved to be a cause for concern even for José Pemartín, one of the architects of the plan, whose affinity for Gentilian selectiveness ended up costing him his position⁷⁶. Once again, the apparent similarity – in this case, of reducing the school network and student body – is simply a mirage. The Gentilian tune of «few schools, but good ones», took the form in Spain of «few schools... public ones, that is».

Despite the parallelisms aptly pointed out by Morente⁷⁷, considerable deep-rooted discrepancies persisted beneath the Fascist and Francoist approaches to secondary education. In the first place, their philosophical positions were very different. Leaving aside the debate over Gentile's Fascism, the intellectual stature of the Italian minister-philosopher put him head and shoulders above the insipid National-Catholic doctrinal elaborations of José Pemartín – in charge of Spanish

⁷¹ Herrera Oria, *Orientaciones de los estudios secundarios en Italia*, cit.

⁷² F. Restrepo, *Cómo se hace una reforma de la enseñanza*, «Razón y Fé», vol. 68, 1924, p. 300.

⁷³ J.M. del Barrio, *Los exámenes de bachillerato*, «Razón y Fé», vol. 77, 1926, p. 133.

⁷⁴ E. Herrera Oria, *La organización del examen de madurez*, «Atenas», n. 56, 1935.

⁷⁵ A.F. Canales, *Innecesarios a todas luces. El desmantellament de la xarxa d'instituts en la postguerra*, «Educació i Història», n. 17, 2011, p. 192.

⁷⁶ Canales, *Pemartín y la frustrada fascistización*, cit., pp. 78-82.

⁷⁷ Morente, *Los fascismos europeos*, cit., p. 188.

secondary education –, of the Jesuit Enrique Herrera Oria (leader of the Catholic sector) and even of the minister and university professor, Pedro Sáinz Rodríguez. On the other hand, while in Italy the State Examination and the restriction of school openings did favor the Church⁷⁸, this should be seen as a collateral result of the rigor and selectiveness that constituted the final objective of Gentile's policies. A comparison suggests that the Gentilian model reserved a subsidiary role for Church schools, making them a refuge for those students who just could not make it in the rigorous public school system. In Spain, very much to the contrary, the ultimate goal was to dismantle the public school system and assign *it* a subsidiary role, while at the same time allowing for a proliferation of religious schools unbound by any rigor or control. It would be hard to find a more forceful illustration of the disparity between the Spanish and Italian reforms than the one provided by the enrollment. The increase of religious centers in Italy owed mostly to the enrollment of students pursuing the less prestigious secondary school subjects and of women, who were discouraged from enrolling in public teacher-training schools (an attempt to make this profession more *masculine*). In the prestigious classics *ginnasio-liceo* track, public matriculations in Italy barely changed: from 77% to 73% between 1926 and 1936⁷⁹. The stark contrast with Spain – registering an abysmal 16% at the end of the 1940s – gives a clear sign of the profound differences between the Fascist and Francoist education. Gentile would never have accepted the idea that the State, the “absolute” that embodies the universal sense of the Spirit and gives meaning to the mission of the Homeland, would fail to properly educate its future ruling classes. In Spain, the Francoist reform simply handed this education over to the Church.

Conclusions

Gentile's influence in Spain was very limited. The main tendencies in pre-war pedagogical thought showed little interest in the *attualismo* of the Italian philosopher. Instead, it moved between the New Education and the appeal of its scientificist approach and the social pedagogy of German inspiration, in particular that of Natorp. Nor was the Catholic educational sector in Spain drawn to Gentile's ideas. Only in Catalan pedagogical circles, or among specific educationalists such as Orencio Muñoz, does there appear to have been some interest in the Italian. Finally, the one book by Gentile published in Spain had no repercussion whatsoever.

⁷⁸ A. Gaudio, *Scuola, Chiesa e fascismo*, Brescia, La Scuola, 1995, pp. 177-181.

⁷⁹ Calculated by the author, based on the Istituto Centrale di Statistica del Regno d'Italia, *Annuario Statistico Italiano*, 1926-1942, Roma.

This lack of influence extends to the educational policies put into place by Franco's regime after the Civil War. Despite the fact that the Spanish secondary school reform of 1938 coincided with the Gentile Reform in its objective of achieving a university-oriented, elitist Baccalaureate program centered on the classics, the seeming coincidence is purely superficial. Spanish Catholicism, after its victory in the war, had a program for reform whose goals were completely independent from Gentile's; where he sought academic rigor, the Catholic Church in Spain was intent on securing the interests of its schools. The supposed influence of the Gentile Reform on the Spanish reform of 1938 is no more than a historiographical mirage.

*Essays and
Researches*



Saggi e
Ricerche

Monumental memory of school in post-unitarian Italy

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ABSTRACT: Why should memorial tablets and statues be of interest to education historians? This essay analyses epigraphic and plastic artefacts as manifestations of public memory of school and as cultural devices for shaping the collective imagination about education and citizenship, in a chronological trajectory from Italian unification. While addressing a set of monumental samples, particular attention is focused on the political reasons behind the choices of installing memorials in honour of educational figures, from teachers to education ministers. Throughout the shifts in power from the second half of 19th century, what emerges is the major heuristic potential embodied in those material historical sources: first of all, the monumental phenomenology is shown to be the expression of a self-celebratory strategy promoted by the ruling classes to legitimate themselves as the guardians of an honourable school past; then, also, the public use of school memory turns out to be designed to strengthen feelings of belonging to a particular community, be it educational, professional teaching, local or national; lastly, monumental traces in the anthropic space are shown to be the signs of a diffuse pedagogy trying to instil a virtuous model of the educator, and more generally of a citizen, into the folds of the collective mentality. By penetrating the official idea of schooling behind inscribed slabs and three-dimensional portraits, what the author has defined as a monumental archaeology of the school imaginary offers an untested standpoint on the cultural history of education.

EET/TEE KEYWORDS: Cultural policy; Education; Memory; Italy; XXth Century.

Introduction

History indeed resembles
a crowded cemetery,
where room must constantly be
made for new tombstones¹.

¹ M. Halbwachs, *The Collective Memory*, New York, Harper & Row, 1980, p. 52.

An educational historian who approaches the monumental testimonies in memory of school characters moves in a field in which a tradition of studies is completely absent and, given the multidimensional nature of the research object, is required to go beyond the threshold of disciplines other than his or her own, such as sociology, epigraphy, linguistics and art history.

The study of monumental artefacts seems particularly suitable for explaining the purposes for which public commemorative practices have been implemented, how they have developed, how they have changed over time, who has been involved and what significance they have had in making the cultural history of school.

The theme of school memory is experiencing great success in educational historiography²:

This taking into consideration of «school memory» as an object of research by educational historians developed in the first decade of the 21st century, in the wake of a profound internal renewal of this context of study on the one hand and, on the other, as a consequence of the growing attention paid by generalist historians to memory policies and the public use of history [...]³.

Educational historians also show interest in the official rituals of memory staged by the dominant circles in accordance with a political purpose of the public use of the past⁴:

This last research perspective in particular enables a deep analysis of an aspect whose historical reach has yet to be correctly situated by historians: how the perception of the public status of education as well as of the school and of the national education system has evolved within a larger or smaller community⁵.

² From September 22-23 2015, Seville hosted the *School Memories* international symposium *New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues*; fifteen contributions collected in C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham (CH), Springer, 2017. For a reconstruction of the process of elevating school memory to a historiographical category, see the essay by J. Meda, A. Viñao, *School Memory: Historiographical Balance and Heuristics Perspectives*, in the above-mentioned volume. Juri Meda and Antonio Viñao define school memory as follows: «when we speak of ‘school memory’ we are not referring to the [cultural] memory transmitted by the school but to memory related to the school, school times and teaching; i.e. the memory that individuals, communities and society have built up about the school world and the educational process» (p. 2). Continuing the research inputs produced by the Seville symposium, see the monograph by J. Meda, L. Pomante, M. Brunelli (edd.), *Memories and Public Celebrations of Education in Contemporary Times*, «History of Education & Children’s Literature», vol. XIV, n. 1, 2019, pp. 11-394.

³ J. Meda, L. Pomante, M. Brunelli, *Memories and public celebrations of education in contemporary times. Presentation*, in *ibid.*, p. 13.

⁴ On the public use of school memory see P. Cunningham, *Making Use of the Past: Memory, History and Education*, «History of Education Society Bulletin», vol. 66, 2000, pp. 68-70.

⁵ J. Meda, A. Viñao, *School Memory: Historiographical Balance and Heuristics Perspectives*, in Yanes-Cabrera, Meda, Viñao, *School Memories*, cit., p. 3.

Despite the mnemic flowering of historical-educational studies, no one – as far as can be determined from the preparatory literature survey – has so far ever examined, with regard to the relationship between school personalities and public commemoration, the set of problems involved in the use of the monumental medium to tell the educational past⁶.

It is not my intention to offer an exhaustive history of this use as I believe that such a project would require the contribution of several scholars. I prefer to prioritize, along a chronological path from the Unification onwards, certain situations or themes that seemed significant to me in the monumental productions implemented as a function of a coherent political strategy of formalized commemoration of the school. It is obvious that the resulting picture, compared to the variegated historical reality, is lacking, although in all probability highly likely. This study, which is venturing into unknown terrain, offers a first attempt to reconstruct some *topos* by sampling sources that have gone through the monumental expression of school memory and the formation of the educational and, more generally, civic mentality.

The pre-selected sources for this research, as has already been mentioned, are the commemorative testimonies that have been crystallized in the anthropic space in monumental form. These are materials designed to be publicly exhibited in solemn ways, whether they are inscribed slabs or sculptures; the distinction between the epigraphic and the plastic monument, although convenient for the purposes of a schematic presentation, does not render, as we will see, the multiplicity of monumental phenomena.

The choice of artefacts, as has been said, was made on the basis of the peculiarities that organically link the individual *pieces* to a politics of memory. The samples examined were selected from a larger *corpus* of monumental sources, accompanied by photographic reproductions. The repertoire, which was created from online searches, was completed by the work on printed sources for the collection of documentation that would broaden the information framework.

All the epigraphic and plastic works studied were subjected to an analytical protocol considering both external and content characteristics, without recognizing any hierarchical superiority of the figurative over the verbal aspect or viceversa, in the belief that the monumental dimension of school memory offers itself compactly in both its material and intangible expression.

Beyond the analytical protocol to which every monumental source of school memory was subjected, some fundamental problems arose with regard to public commemorative practices. In order to provide an interpretative map

⁶ Indeed, while not addressing the political significance of monumental productions in the memory of teachers, an exception is the pioneering work of B. Šuštar, *Faded Memories Carved in Stone: Teachers' Gravestones as a Form of Collective Memory of Education in Slovenia in the 19th and Early 20th Century*, in Yanes-Cabrera, Meda, Viñao, *School Memories*, cit., pp. 175-186.

of the work, I briefly summarize here two of the problematic aspects addressed in more detail later. As Zygmunt Bauman noted:

For the members of the ruling class to be able to make their individual bids for immortality with any hope of success, the possibility to use the stakes at their disposal in the bidding game must be assured by the future-binding dominance of the class⁷.

The first problem that I addressed, therefore, was that of trying to clarify the links between the right to a publicly commemorated death and the privilege of immortality guaranteed by power. Furthermore, it has already been said that the use of monumentalism was an important element of the politics of memory. So, the second major problem that this research addressed was that raised by the identification in public commemoration of a tool of mass psychology in the hands of elites to keep themselves going.

In actual fact, these problems can be summarized in a single and fundamental question which is at the heart of this work and to which an answer has been sought: what was the function of the monumentalization of the school past over time?

When considering the idea of school that is inherent in the manifestations of public memory, I guarded against two errors: first, mere subordination of the school imaginary to material realities considered to be the only realities to be automatically elevated to the status of primary historical causes – in essence, I avoided the deterministic approach to the relationship of the economic structure with the cultural superstructure; secondly, and conversely, the assignment to symbolic productions of the exclusive role of the engine of history – I likewise avoided the culturalist overturning of determinism. A historical explanation must enhance the separate existence of the symbolic within society; at the same time, in order to penetrate the political intention underlying public commemorative initiatives, it must compare the representational elements of memory with the *milieu* from which they come.

In the light of Jacques Le Goff's teaching, I posed the question of addressing monumental sources as follows: the main duty of the historian in dealing with these documentary tools, not unlike others, is that of critical revision; the task for the scholar is to give voice to traces which in the epigraphic expression tacitly imply contents different from those that are explicitly stated and in the sculptural artefacts are not verbal at all. Memorial tablets and statues, like every other document, are the result of an assembly of society that produced them based on the relationships established by the forces that held power in it. Monumental phenomenology, even when a political body is not its direct sponsor, is an expression of the effort of the ruling classes to impose a certain image of themselves on the future. For this reason, the monument «is a thing that

⁷ Z. Bauman, *Mortality, Immortality and Other Life Strategies*, Cambridge, Polity Press, 1992, p. 59.

remains, that lasts and the testimony, the teaching [...] that it brings must first be analysed by demystifying its apparent meaning. [...] First of all, it is necessary to disassemble, demolish that assembly, deconstruct that construction»⁸. Only criticism of that document which is the monument allows «the historian to use it scientifically, that is, with full awareness of the cause»⁹.

What emerges from the monumental narration of the school past is only apparently a story of the dead and of death; in actual fact, on closer inspection, it is a story of the living and of life, mixed with domination and exclusions, praise for individual virtues and concealment of systemic deficiencies, idealities and opportunisms.

1. *The political functions of public memory*

Public memory reconstructs an image of the past that is in accord with the dominant thoughts of society: in the selection of past events worthy of mention, the perspective presented to the governed is that of the rulers. Maurice Halbwachs' contribution was fundamental for understanding the exquisitely social character of memory¹⁰. For the French sociologist, the time of memory «is not identical to the events that have occurred within it. [...] The traces of past events and people are present insofar as they have answered, and still do answer, an interest or concern of the group»¹¹. In the formalized expressions of memory, the recovery of history is necessarily partisan; what is at stake, in fact, is the affirmation of representations of the past that are crucial for the conservation of existing power relations; hence, the organic unity of all successive events is sifted through institutional filters that ensure that a canon of what is precious from the past for maintenance of the status quo prunes the complexity of history. The *récits historiques* that bear the seal of official status

⁸ J. Le Goff, *Storia e memoria*, Turin, Einaudi, 1986, pp. 454-455. The original draft of this monograph is in Italian. The English edition – Id., *History and Memory*, New York, Columbia University Press, 1992 – lacks the fundamental chapter entitled *Document/monument*, to which it is essential to refer.

⁹ *Ibid.*, p. 452.

¹⁰ I maintain, in line with the *Annales* school of historiography, that the dialogue of history with sociology is fruitful in the intersection of their different interests: history towards the explanation of the events which, as such, occur only once, and sociology towards the constant characters of society. Jacques Le Goff believes that «the work of history has the purpose of putting intelligibility into the historical process and that this intelligibility leads to the recognition of *regularities* in historical evolution». It is also with the collaboration of sociology that the historian can identify the general explanatory mechanisms that are indispensable for the understanding of past events in their particularity. Le Goff, *Storia e memoria*, cit., p. 31 [italics in text].

¹¹ Halbwachs, *The Collective Memory*, cit., p. 118.

are produced by the groups in power, with the purpose of calling the masses of recipients to adapt to the model of the good citizen.

However, history that, by giving examples, becomes *magistra vitae* is not history: «The lesson of history» – says Le Goff – «is ultimately summed up in a negation of history. The positives that it leaves are the examples of ancestors, heroes and great men. [...] history, a source of *exempla*, is not that different from rhetoric techniques of persuasion»¹². In the screening of the past, the rationale of public memory is to educate the present to make the future safer.

The time of memory, I have said, is not historical time at all. However, the transformations that the image of the past undergoes are deformations that obey the very law of the functioning of memory, which is what Halbwachs' great insight focuses on:

a remembrance is in very large measure a reconstruction of the past achieved with data borrowed from the present, a reconstruction prepared, furthermore, by reconstructions of earlier periods wherein past images had already been altered¹³.

After all, the semantic link with the imagination is structurally incorporated in the word memory – as Le Goff notes, quoting Giambattista Vico:

The Latins called memory *memoria* [...] But in the same way they designated the faculty by which we form images, which the Greeks call *phantasia*, and we *imagination*; for where we commonly say *to imagine*, the Latins said *memorare* [...] ¹⁴

From Marx have learned that the ideas of the ruling class are the ruling ideas. Nonetheless, for Zygmunt Bauman, to whom we owe an illuminating analysis of the role of public memory in social reproduction, it is not enough that the dominion of ideas is contemporaneous with the domination of class. The ideas for which dominance strives to ensure the prevalence must be raised to the honours of atemporality. Attaching labels of eternity to dominant thoughts works to perpetuate hegemony, as well as reassuring governors about the possibility of securing a place in the memory of posterity. The Polish sociologist states that,

as it serves the eternal values, life of the rulers 'transcends mere quotidianity'. The rulers' biographies become history. Unlike the lives of ordinary mortals, [...] they will be considered worthy to be carefully recorded [...]. They will escape the lot of transient objects – which [...] disappear from view (and thus from the existence that counts) and dissolve, perhaps forever, in anonymous formlessness of obscurity¹⁵.

¹² Le Goff, *Storia e memoria*, cit., p. 49 [italics in text].

¹³ Halbwachs, *The Collective Memory*, cit., p. 69.

¹⁴ Le Goff, *Storia e memoria*, cit., p. 385 [italics in text].

¹⁵ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 58.

Those entitled to public commemoration are highlighted the more they stand out from the mass of ordinary people whose memory is destined quickly to end up in the drain of history.

The power to leave testimonies capable of orienting the judgement of posterity in this or that direction has been one of the major concerns of the groups that have dominated and dominate historical societies. As Bauman writes, the exclusive right of rulers to tell the history could be exercised

only at the expense of the power-assisted forgetting of some other pasts – unfit to be accommodated [...] and hence bound to be devalued and disowned. That condemned past was glossed over in silence and thus made into non-history. Alternatively, in case such radical treatment was not feasible, it was diminished in significance or degraded in moral value¹⁶.

Elites, in order to defend their social pre-eminence in the future, need to retrospectively magnify an anthology of great names and deeds; in doing so, they draw the boundaries between the *historical* and the *non-historical*, the noble and the vulgar, that which endures and that which is transient.

Following Isnenghi we can state that «absences, historical gaps, as choices, are just as valid as presences»¹⁷. A denial of presence in official recordings that is threefold: firstly, everything that is not congruent with a didactic narrative of the past is missing; secondly, the figures whose value is not recognized within the hegemonic framework at the time of their death are absent; thirdly, there are no personalities whose memory has been obliterated by a change in the balance of power. Silences, oblivions and removals, as we will see later, are the manipulative operations put in place because the official narrative of history cannot allow representations of the past that are not functional to the survival of the establishment.

Popular memory, unlike the remembering promoted by the ruling classes, does not find space in official records. The formation of public memory, however, is not necessarily reduced to a forced operation of selecting what from the past must be preserved; although intended from above, it can have the character of spontaneous sedimentation; if so, it strengthens social cohesion through affective adherence from below. In fact, the official narrative formulations in which the public has found a way to become a participant actor, in some way identified with a shared memory, should not be ignored. In this case, a grassroots component, capable of self-recognition and involvement by the recipients, is added to the public narrative.

¹⁶ *Ibid.*, pp. 121-122.

¹⁷ M. Isnenghi, *Alle origini del 18 aprile*, in M. Gervasoni (ed.), *Mappe dell'immaginario. Per una storia culturale del contemporaneo*, Milan, Unicopli, 1999, p. 173.

2. *The monumental medium for the transmission of memory*

The tools for preserving official records are archival ones par excellence. Nonetheless, there are other forms to facilitate the spread of institutional memory and the adjustment to the established order; to name a few, the arrangement of public funerals¹⁸, the definition of a calendar of civil events, the issuing of postage stamps, coins or banknotes, the construction of monuments, the toponymy¹⁹ and designation of *institutional* memorial sites²⁰.

Here the visual angle from which we look at public memory is that of monumental phenomenology. Going back to the Latin form, the word *monumentum*, deriving from the verb *monere* which means *to remind*, is connected to the Indo-European root *men*, which expresses one of the fundamental functions of the mind, i. e. memory; the termination *-mentum* indicates not only the act of bringing to the attention of posterity great events or illustrious personalities of the past but also the means of remembrance²¹. The desire to commemorate that is intrinsic to monumentalism is materialized in the affixation of inscribed slabs and in the erection of statues. With the concept of monumental narration of the past, therefore, we seek to refer to the epigraphic and plastic dimension of public memory.

Monumental civism, in the selection of the memorable, is structured based on widely stereotyped criteria: the official narrative practice is always committed to showing a core of immortal values didactically. The monumental *mise en scene*, therefore, is not limited to the function of preserving memory; in actual fact, it points to an ideological horizon towards which to strive: «Memory [...] aims to save the past only to serve the present and the future»²². The monumentalization

¹⁸ See M. D'Ascenzo, *Remembering teachers and headmasters. Funeral memories as source in history of education between nation building and collective memory*, in Meda, Pomante, Brunelli, *Memories and Public Celebrations of Education in Contemporary Times*, cit., p. 13.

¹⁹ See *Le città leggibili. La toponomastica urbana tra passato e presente. Atti del Convegno di Studi (Foligno, 11-13 dicembre 2003)*, «Bollettino della Deputazione di Storia Patria per l'Umbria», vol. CI, n. 2, 2004, pp. 9-235. Regarding school toponymy, see M. D'Ascenzo, *Creating Places of Public Memory through Naming of School Buildings. A Case Study of Urban School Places in Bologna in the 19th and 20th Centuries*, «El Futuro del Pasado», vol. 7, 2016, pp. 441-458; Ead., *Collective and public memory on the walls. School naming as a resource in history of education*, «History of Education & Children's Literature», vol. XII, n. 1, 2017, pp. 633-657. For a case study on the theme of naming public buildings after school personalities, see C. Venturelli, *A stone on the wall. Collective and public memory of an eclectic primary teacher*, in Meda, Pomante, Brunelli, *Memories and Public Celebrations of Education in Contemporary Times*, cit., pp. 223-237.

²⁰ See M. Isnenghi (ed.), *I luoghi della memoria*, 3 vols., Roma-Bari, Laterza, 1996-97. Regarding the places of school memory, see J. Meda, *The "Sites of School Memory" in Italy between memory and oblivion: a first approach*, in Meda, Pomante, Brunelli, *Memories and Public Celebrations of Education in Contemporary Times*, cit., pp. 25-47.

²¹ See Le Goff, *Storia e memoria*, cit., p. 443.

²² *Ibid.*, p. 399.

of the past, therefore, responds to immediately commemorative, overarchingly didactic, latently political purposes.

Monumental phenomenology occurs wherever the model of the good citizen can be visualized. Bauman focuses the question:

The stakes on which the hope of immortality is founded must be assured a central place in the way the living universe is charted – a prominent, not-to-be-missed place, a place that attracts acute ('undying'!) interest and is widely accepted as a proper site for public celebration²³.

Monumental narrative texts are, as a rule, on the façades of municipal buildings or on the fronts or in the atriums of school buildings: these public sites are the symbol of the continuity of power at local level. Exposition does not end here because it is extended to the birthplace or dwelling houses of the figures mentioned, to places of social interaction, such as squares, public gardens and main streets, and to cemeteries, which can also display the public signs of history. The anthropic space is the theatre for the staging of the official formulations of the past²⁴.

The monumental narrative adopts visual-spatial forms of transmission. Epigraphic and plastic artefacts fix public memory in the urban landscape²⁵. On the subject of the relationship between memory and space, Halbwachs' considerations were forerunners of subsequent acquisitions:

Every collective memory unfolds within a spatial framework. Now space is a reality that endures: since our impressions rush by, one after another, and leave nothing behind in the mind, we can understand how we recapture the past only by understanding how it is, in effect, preserved by our physical surroundings²⁶.

Each group cuts up space in order to compose, either definitively or in accordance with a set method, a fixed framework within which to enclose and retrieve its remembrances. [...] It is the spatial image alone that, by reason of its stability, gives us an illusion of not having changed through time [...]²⁷.

We can define monuments non only as locations of public memory but also as the vestiges of the occupation of space by power. Indeed, «most groups [...] engrave their form in some way upon the soil and retrieve their collective remembrances within the spatial frame work thus defined»²⁸. What makes

²³ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 57.

²⁴ It is understood that the narration created by toponymic titles and institutional memory sites also participates in the localization of history; nevertheless, these spatial propagators of the public image are not the subject of analysis.

²⁵ See the chapter *Il paesaggio urbano* in F. Targhetta's monograph, *Un paese da scoprire, una terra da amare. Paesaggi educativi e formazione dell'identità nazionale nella prima metà del Novecento*, Milan, FrancoAngeli, 2020.

²⁶ Halbwachs, *The Collective Memory*, cit., pp. 139-140.

²⁷ *Ibid.*, p. 157.

²⁸ *Ibid.*, p. 156.

the difference in the conservation of memory is the robustness of the material used to produce commemorative artefacts: «the group memory endures much like the buildings presumed to house it»²⁹. Elites, therefore, leave the memory of themselves on objects that defy the ravages of time: as the permanence in time of monumental phenomenology gives concrete form to the idea of social continuity, public memory needs the durability of precious stones or metals, like marble and bronze, to guarantee perpetuation. These materials are truly the closest there can be to immortality, they represent it; to be preserved in epigraphic and plastic records – which are meant to be forever – is to become immortal. In Bauman's opinion,

the hope of transcending the present and stretching it into the future can be rooted only in making the past last. That hope lies behind the constant temptation to retrieve the past, never to let it out of living memory – as if to demonstrate in such a roundabout way the non-transience of things; more precisely, the non-transience of *certain* things, relevant to *certain* people [...] ³⁰.

Because what is at stake in the control over official records is the continuation of society as we know it, the ruling classes can hope to colonize the future to the extent that they have a monopoly on binding the past to monumental materiality. For the excluded, conversely, lasting non-visibility is equivalent to having no place in history.

On the matter of significant figures who have sunk into monumental oblivion, Mario Isnenghi writes:

You have to die at the right time, this is one of the rules, if rules can be abstracted from a phenomenology of memory [...]. Whoever dies [...] late or in any case out of time or not in synchrony with his own historical era has little chance of activating a desire to remember and honour him in public and stable forms³¹.

For example, the absence of a monumental tribute, at least until the end of the twentieth century, to a person of great stature such as Luigi Credaro, who died in 1939, is not striking, insofar as we assume that the defeat of the anti-Gentile front, even after World War II, even with the crisis of idealistic hegemony, may have been perceived as a rejection decreed by history itself in the face of the overwhelming superiority of the actualist culture.

The monumental presence in the anthropic space is dynamic because the materials of the historical narrative deposited there vary as the interests at stake vary. The formation of public memory is mobile because

²⁹ *Ibid.*, p. 151.

³⁰ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 55 [italics in text].

³¹ M. Isnenghi, *La storia nelle vie e nelle piazze*, in M. Petrantoni (ed.), *Memorie nel bronzo e nel marmo. Monumenti celebrativi e targhe nelle piazze e nelle vie di Milano*, Milan, Federico Motta Editore, 1997, p. 40 [italics in text].

groups that develop the reigning conceptions and mentality of a society during a certain period fade away in time, making room for others, who in turn command the sway of custom and fashion opinion from new models³².

Sometimes, figures from the past who are not recognized by their contemporaries as candidates for immortality are admitted to the pantheon of the memorable with the emergence of new groups that «command the sway of custom». I give an example from Pisa, located in Via Contessa Matilde: the dedication of a stone memorial to Carlo Cammeo – teacher, socialist militant, killed in 1921 by Blackshirts in the gardens of the school where he taught – had to wait until the collapse of the fascist dictatorship; in fact, the placement of the memorial in the place where the attack took place dates back to the years after WWII (1).

(1)³³

PER SICARIA MANO FASCISTA
CADEVA ASSASSINATO
IL 13 APRILE 1921

CARLO CAMMEO

GLORIFICANDO COL SANGVE
LA SANTITÀ DELLA SCVOLA
E LA SVA FEDE
NELL'IDEA SOCIALISTA

LA GIVNTA MVNICIPALE DI PISA
ALL'ALBA DELLA LIBERTÀ
INTERPRETANDO I SENTIMENTI
DELLA CITTADINANZA

«OCCHI DI BIMBI CHE VEDESTE MORTO IL MAESTRO
DITE AGLI VOMINI ESTERREFATTI
QVANTO AMORE IRRADIASSE

³² Halbwachs, *The Collective Memory*, cit., p. 65.

³³ For this study, the transcription of the text of the inscriptions is rarely based on direct inspection of the originals – photographs of the monuments were used. Furthermore, I followed the transcription criteria set out in P. D'Achille, *Parole: al muro e in scena*, Florence, Franco Cesati Editore, 2012, p. 120: in accordance with the originals, I use upper-case characters without rendering any variations in the body of individual letters, words, syntagmas or phrases; for full transcriptions, I use the segmentation in lines of different length that characterizes the epigraphic *mise-en-page*; conversely, when I quote parts of text, as well as when I include the English translation of the epigraphs in footnotes, I mark the change of line with a slash (/); I carry over, if present, empty lines or breaks; I adhere to current usage in the choice of acute or grave accents, as the accent is sometimes rendered with an apostrophe in the texts; I maintain, where used, V for U; I do not insert punctuation, unless it is already in the originals.

LA MITE ANIMA SVA
POI CON LE MANI AVVINTE AD VNO AD VNO
PROMETTETE O BIMBI
CHE SARETE BVONI COME LVI FV BVONO»³⁴

On other occasions, the public memory of the same personalities, in the long run, is expressed in contents different from those previously produced, in the light of «new models» corresponding to changed power structures:

the image of a departed one is never frozen. As it recedes into the past, the image changes as certain features are effaced and others accentuated according to the perspective from which he is viewed – that is, depending on the new conditions in which we turn our attention upon him³⁵.

The mnestic fortune of Francesco De Sanctis, three times in charge of the Department of Public Education, is such as to render visible the variations over time recorded in the treatment of a personality with a consolidated commemorative tradition. The importance of the «conditions in which one finds oneself at the moment of turning towards» the commemorated figure comes to light from the comparison between two chronologically distant epigraphic works in Avellino, in memory of the founder of Italian literary historiography. In 1884, the year following his death, a plaque was placed inside the Pietro Colletta National Boarding School, in the head's office (2).

(2)

A
PERPETUO RICORDO
DEL NOME E DELLA VIRTÙ
DI FRANCESCO DE SANCTIS
CHE AGLI STUDI ALLA PATRIA ALLA LIBERTÀ
CONSACRO' LA INTEMERATA VITA
QUI OVE TAL FIATA DALLE GRAVI CURE DI STATO
E DALLE MEDITATE VEGLIE
CERCO' RIPOSO E QUIETE
LA GIOVENTU' STUDIOSA E GLI AMMIRATORI
QUESTO MARMO POSERO
MDCCCLXXXIV³⁶

³⁴ Murdered by / fascist assassins / on 13 april 1921 / Carlo Cammeo / who gave his blood / for the sanctity of schooling / and his faith / in the socialist ideal / the municipal council of Pisa / at the dawn of freedom / interpreting the sentiment / of the townspeople / «eyes of children who saw your teacher dead / tell the astounded men / how much love / his gentle soul radiated / and put your hands together / and one by one promise oh children / that you will be good as he was good».

³⁵ Halbwachs, *The Collective Memory*, cit., p. 72.

³⁶ To / the eternal memory / of the name and virtue / of Francesco De Sanctis / who dedicated his stainless life / to study, to the fatherland, to freedom / here where he at times sought rest and quiet / from his state duties / and his reflective vigils / students and admirers/ placed this marble/ MDCCCLXXXIV.

In 1933, fifty years after the literary critic's death, the façade of the Prefecture, in Corso Vittorio Emanuele II, received another plaque (3).

(3)

FRANCESCO DE SANCTIS
DELLA PATRIA
— RIBELLE ESULE O MINISTRO —
SOLDATO COSTANTE
NELLA SCUOLA E NELLA CRITICA LETTERARIA
SOVRANO
AUSPICANDO ROMA
CAPITALE DELLO SPIRITO MODERNO
VALICÒ IL SUO TEMPO
INVOCÒ IL NOSTRO

L'IRPINIA
NEL CINQUANTENARIO DELLA MORTE
MCMXXXIII-XII E.F.³⁷

The late nineteenth-century profile is that of a man consecrated to *reflective vigils* of study and to *state duties*. Fifty years later, De Sanctis, the *rebel exile* for his anti-Bourbon militancy and *minister* to Minerva, is defined as a *constant soldier*: the portrait of the dedicatee is therefore loaded, under the influence of fascist suggestions, with militarist elements. Furthermore, it would seem that the wish for *Rome to be the capital of the modern spirit*, attributed to this man *prominent in education and literary criticism*, had to wait for the birth of the Fascist era to come true. In fact, the idea of Italian supremacy, which was the basis of Mussolini's nationalistic politics, was incorrectly credited to De Sanctis. The Irpinia intellectual's aspiration for the introduction of post-risorgimento Italy into the circuit of the modern history of Europe was not burdened by the call to the greatness of the past; for him, indeed, «what most prevents a people from being great is believing themselves great»³⁸.

At other times, Isnenghi notes, some monumental signature of the anthropic space ceases to «coexist promiscuously and stratigraphically with those that precede and follow it. [...] history also presents cases of violent death, by violation and destruction»³⁹; it may happen that previous investitures to posthumous

³⁷ Francesco De Sanctis / constant soldier / of the fatherland / rebel exile or minister / prominent / in education and literary criticism / wishing for Rome / to be the capital of the modern spirit / he went beyond his time and invoked our / Irpinia / on the fiftieth anniversary of the death / MCMXXXIII-XII f.e. (fascist era).

³⁸ F. De Sanctis, *Discorso ai giovani*, in Id., *Il Mezzogiorno e lo Stato Unitario*, ed. by F. Ferri, Turin, Einaudi, 1972, p. 11.

³⁹ Isnenghi, *La storia nelle vie e nelle piazze*, in Petrantoni, *Memorie nel bronzo e nel marmo*, cit., p. 40.



Pic. 1. Bust of Francisco Ferrer (1913), by Gino Guadagni, in Carrara, Piazza Alberica (Photo: René & Peter van der Krogt, <<https://statues.vanderkrogt.net>>)

continuity turn out, in the eyes of new observers, to be no longer legitimate up to the point of being struck by *damnatio memoriae*: mnemonic conceptions whose symbolic content is received with aversion are swept away. For example, in Carrara, Via Roma, in 1913, on the occasion of the fourth anniversary of the death by firing squad of Francisco Ferrer, in honour of the Spanish anarchist, founder of the *Escuela Moderna*, a bust by the sculptor Gino Guadagni was inaugurated (Fig. 1); below the base, the artefact bore an epigraph written by the poet Ceccardo Roccataglia Ceccardi (4); the commemoration ceremony included speakers such as the secretary of the local Chamber of Labour Alberto Meschi, the socialist politician Francesco Betti and the republican deputy Eugenio Chiesa.

(4)

FRANCISCO FERRER
EDUCATORE DI PLEBI ALLE CIVILI VENDETTE
IL MAGISTERO PAGÒ CON LA VITA

GLI ANARCHICI — ANNO 1946⁴⁰

Once the Fascist era began, the Carrara work, like other epigraphic and plastic objects celebrating Francisco Ferrer subject to the iconoclastic fury of Blackshirts against this symbol of free thought, was destined for destruction; but actually, once removed, it was saved from the ignominy of being smashed to pieces. In 1946, the political-cultural conditions had changed⁴¹; therefore, the artefact was relocated in a site of greater visibility, Piazza Alberica⁴². Even with the restoration of Ferrer's stone memory, the fact remains that the monumental stratification cannot be understood as an uninterrupted continuum of additions, given that the change of forces in power can lead to the definitive erasure of previous symbolic layerings not compatible with the new paradigm of society.

3. *Monumental memory over time*

Faced with epigraphic and plastic artefacts intent on narrating an exemplary story, the dimming of monumental visibility in the eyes of subsequent generations of spectators could be understood as a response of defensive estrangement from so much pedagogical emphasis. Halbwachs offers a different explanation: «Neither ill will nor indifference causes [a society] to forget so many past events and personages»⁴³; more simply, the memory of a series of events is vivid as long as it is kept in the minds of the individuals who were witnesses or heard the story from others directly involved; but as those who have been a living archive disappear, the memory of a society slowly disintegrates. Over time, therefore, epigraphic and plastic artefacts exhaust their power of signification and are reduced to silent vestiges of history. The habit of everyday places diverts the attention from the monumental artefacts or even obliterates their very presence; few passers-by are concerned with deciphering the inscriptions and getting to know the characters represented in the sculptures.

⁴⁰ Francisco Ferrer / educator of the people to civic revenge / paid with his life for his teaching / the anarchists - year 1946.

⁴¹ Immediately after 25 July, 1943, the spatial *liberation* from the fascist monumental narrative came into action.

⁴² See F. Bertolucci, «A ricordo imperituro...», «A-Rivista anarchica», vol. XXXIX, n. 9, December 2009 - January 2010, pp. 98-107.

⁴³ Halbwachs, *The Collective Memory*, cit., p. 82.

Even to the sensitivity of the historian, who is accustomed to examining archival and printed documents, the monumental sources of memory do not appear immediately. In order to research epigraphic and plastic exhibits scattered throughout the territory, the historian is required to exercise the archaeologist's spirit of observation. As is known, archaeology is the discipline that reconstructs the past through analysis of material evidence. To the historian, inscribed slabs and sculptures, traces of monumental stratification, offer themselves as material sources to be consulted.

Can the scholar of monumental sources be entrusted with the task of bringing to life the memory of which they are one of the tools of conservation? Of course, one of the aims of history is to build a bridge between the past and the present. Nevertheless a historical reconstruction, however meticulous it is, cannot re-establish a living, direct contact with the past; historical knowledge, even very thorough, is not enough to create a memory. In the words of Halbwachs, memory is based not on learned history, but on lived history, which «possesses everything needed to constitute a living and natural framework upon which our thought can base itself to preserve and recover the image of its past»⁴⁴.

4. *The functioning of monumental communication*

Monumental abundance is a post-unification phenomenon: it is since the years immediately following the birth of the Italian state that the public spaces of the main cities, as well as those of small provincial towns, began to be filled with inscriptions and statues, attesting to the ongoing relationship between the use of public memory and the desire for self-confirmation of power. Once territorial unity had been achieved, monumentalization, as an instrument for the construction of a common memory, was closely linked to the need to start a process of cultural nationalization: the monumental rewriting of the urban landscape contributed to the internalization of the constitutive values of being Italian; the public use of the anthropic space, therefore, sought to build a consensus – «made of stone, monuments and ceremonies»⁴⁵ – towards the new ruling classes.

Here we will try to identify recurring expressive criteria in the epigraphic and plastic medium in order to explain how the monumental narrative of the past seeks to penetrate into the collective imaginary. Whether the works are epigraphic or plastic, there is an intimate correspondence between the object of communication and the form of communication: the figurative and even the

⁴⁴ *Ibid.*, p. 69.

⁴⁵ B. Tobia, *Una patria per gli italiani. Spazi, itinerari, monumenti nell'Italia unita (1870-1900)*, Roma-Bari, Laterza, 1991, p. 163.

verbal contents are inseparable from the monumental materiality. Monumental communication «draws persuasive strength from the ‘what’ that it proposes, as well as, and perhaps even especially, from the ‘how’ and even the ‘where’ and the ‘together with’ that it offers»⁴⁶. The communicative effectiveness of memorial tablets and sculptures is achieved as a whole by their material and immaterial components.

4.1. *Epigraphic medium*

The epigraphic scholars⁴⁷ Giancarlo Susini and Angela Donati, with the definition they give of epigraphic monuments, outline their four salient physical features; the inscription is

public writing, placed in accessible and frequently visited places [...]: an exposed writing [...] is immobile, static, permanently connected to the environment and to the landscape, it is itself a monument (in the Latin semantics of *monimentum*, *monumentum*), and is programmatically imagined for infinite permanence in the monumental context to which it belongs, that is, it bears the requisites of perennality⁴⁸.

In summary, the material peculiarities of epigraphic monuments are the public face, uniqueness, immobility and durability.

The epigraphist Silvio Panciera insists on the theme of publicity: «I would identify the specific quality of epigraphic communication in its addressing whatever information it is meant to communicate, at least in intention, *erga omnes*, or at least to the greatest number of potential readers»⁴⁹. In fact, the exhibition facilitates a potentially mass contact or in any case a more numerically significant contact than that possible with a text in a book or document, which is intended for a singular reading. The use of the epigraphic expression can be thus enlarged because it is not intentional⁵⁰. Involuntariness is functional to the pre-eminent purpose of disclosure to as many recipients as possible: the majority of users are,

⁴⁶ E. Groppo, A. Sartori, C. Vai, *Schemi compositivi delle iscrizioni latine: le giustificazioni metodologiche*, «Archeologia e Calcolatori», vol. 7, 1996, p. 772. In fact, the authors refer only to the epigraphic medium. I took the liberty of extending the concept to statues.

⁴⁷ Given the specificity of the inscriptions as sources, the historian is called upon to approach epigraphy as a discipline whose primary purpose involves the presentation and critical review of the exposed writings.

⁴⁸ G.C. Susini, A. Donati, *La scrittura esposta: i modi della scrittura romana*, in G.R. Cadorna (ed.), *Sulle tracce della scrittura. Oggetti, testi, superfici dai Musei dell'Emilia-Romagna*, Casalecchio del Reno (BO), Grafis Edizioni, 1986, p. 65 [italics in text].

⁴⁹ S. Panciera, *What is an Inscription? Problems of Definition and Identity of an Historical Source*, «Zeitschrift für Papyrologie und Epigraphik», vol. 183, 2012, p. 4 [italics in text].

⁵⁰ See M. Grossi, *ΕΓΓΡΑΦΗΝ ΔΕ ΚΑΙ ΤΙΤΑΙΟΝ Ο ΠΙΛΑΤΟΣ* (GV 19,19). *Verso una nuova definizione di iscrizione*, «Zeitschrift für Papyrologie und Epigraphik», vol. 197, 2016, pp. 85-95.

in fact, «occasional spectators – spectators in a passive sense, inert, purely for the acknowledgement of something new – even more or less riotous or not interested in seeing it, not to mention understanding it»⁵¹. Focusing on ostentation before an audience that has become an audience in spite of itself, inscriptions – which are like stone documents – add to the function of real archives an insistent character of publicity, which, even if not sought after, can be potentially internalized; the intention is, therefore, to always have a conditioning effect.

Inscribed slabs carry not only verbal messages: the meaning of the writings on display is revealed in full only when the writing media are also assumed as signifiers. The physical presence of the artefacts, observes the epigraphist Antonio Sartori, imposes itself on the attention of the public, even before the content of the inscriptions. The plaque itself is already eloquent regardless of the epigraph: communications are performed through the dimensions, the spatial location, the material used, the processing, the technical skills applied and, if present, the decorative and / or plastic apparatus; all these components are never marginal, indeed they are complementary or even independently expressive with respect to the epigraphic text⁵².

The considerations on the visual-spatial value of epigraphic communication are applicable not only to the writing media but also to the inscriptions themselves: as the linguist Paolo D'Achille suggests, «in the writings on display the visual character of the written language (compared to the phonic-auditory nature of spoken language) assumes a pre-eminent role and allows, in a certain sense, the language itself to be acted on»⁵³. In fact, in addition to location in clearly visible places, the intention of publicly exposing is decisively affected by the writing in capital letters, the retouching with a brush, in black or red, of the engraved letters or the fact that the letters are metal and therefore in relief. Moreover, the visual structure that the epigraphs assume within the monumental surface intended for writing is very important: the arrangement of the text is resolved in the division into lines in a way that echoes poetry, even if the drafting occurs mostly in prose. Graphic solutions typical of epigraphic layout also enable certain informative data to be highlighted: thus, as can be seen from the examples already presented, the name and surname of the commemorated person alone occupy one line and are written in larger characters than other words; moreover, a line is usually also reserved for the date.

Regarding strictly verbal phenomenology⁵⁴, post-unitary epigraphomania, aimed as it was at redesigning the linguistic landscape of the resurrected

⁵¹ A. Sartori, «*Tituli*» da raccontare, «ACME – Annali della Facoltà di Lettere e Filosofia dell'Università degli Studi di Milano», vol. LVIII, n. 2, May-August 2005, p. 91.

⁵² See A. Sartori, *La comunicazione epigrafica e l'epigrafia comunicata*, «Sylloge Epigraphica Barcinonensis», vol. VII, 2009, pp. 66-67.

⁵³ D'Achille, *Parole: al muro e in scena*, cit., p. 147.

⁵⁴ I am indebted to Paolo D'Achille for focusing on the historical-linguistic aspects of the exposed writings. See D'Achille, *Parole: al muro e in scena*, cit., pp. 119-187. Regarding the

nation⁵⁵, is accompanied by very significant evidence: the generalized, albeit not exclusive, adoption of Italian instead of Latin, in which, even in modern times, writings on display were traditionally conceived. Not that it was previously impossible to record the existence of inscriptions in the *vernacular* – but, post-unification, a practise that until then was unusual was institutionalized. The Italian language guaranteed – at least in principle, as we will see – immediate and enlarged readability of the epigraphs, marked the finally unified national territory and was in harmony with the secular spirit of the new-born state, given the continuing role of Latin as the official language of the Church; in this regard, the meaning of the epigraphic use of Italian instead of Latin, when the intent was anticlerical, was clearly ideological.

Nonetheless, inscriptions in Italian did not mark a sharp break with the past; links with the Latin epigraphic tradition can be grasped in the persistence of certain graphic styles: the use, as already mentioned, of capitals (epigraphs or parts of epigraphs in lower case are rare); the absence of punctuation; the preference, widespread at least until recent years, for Roman numerals, rather than Arabic numerals, in dates; frequent maintenance of V for both the consonant *v* and for the vowel *u*. As for the syntax, the Latin traits, such as placement of the verb at the end of the sentence and positioning the object before the subject, remain; the resulting archaic effects aim to provide a high register rendering. «Together with the iconic expression», the characters of Latin epigraphy transferred into Italian epigraphy, «collaborate synergistically in the literary success of a text» whose completeness is achieved «only when it acquires its form in stone»⁵⁶.

Taking account of the fact that the texts are linguistically divided into narrative, descriptive, argumentative and prescriptive, commemorative inscriptions constitute a narrative textual typology confirmed by the prevailing use of verbs in historical tenses, especially the remote past, which is precisely the tense of narration par excellence⁵⁷. The text of the inscriptions includes a

interdisciplinary relationships between the history of language and general history, the philologist Alberto Vàrvaro has no doubts «on the fact that the linguist, the historian of language, has a great deal to learn from the historian's methodology and from the results he has achieved or can achieve». However, Vàrvaro also believes that the general historian can «learn much from a less suspicious consideration of language». A. Vàrvaro, *La parola nel tempo. Lingua, società e storia*, Bologna, il Mulino, 1984, p. 88.

⁵⁵ Fabio Targhetta defines the linguistic landscape as «the scene in which the public space is symbolically constructed through the written word. [This notion] is an important indicator of authority, influence and the ability to penetrate the public narrative [...]». Targhetta, *Un paese da scoprire, una terra da amare. Paesaggi educativi e formazione dell'identità nazionale nella prima metà del Novecento*, cit., p. 135.

⁵⁶ L. Melosi, *A perenne memoria. L'epigrafia italiana nell'Ottocento*, Rome, Edizioni di Storia e Letteratura, 2011, p. 4.

⁵⁷ In addition, the use of the remote past tense infuses the writings with a courtly tone and distances the epigraphic language from spoken Italian, which, as is well-known, mainly uses the present perfect tense.

plurality of subtexts, not always necessarily all present: one, with the name of the dedicatee, functions as a sort of title; another, reporting the facts that illustrate the virtues of the honoured personage, uses event information to weave a laudatory plot; yet another provides chronological references regarding the honoured personality or the facts mentioned or the plaque concerned; a final one recalls the commissioning body.

«The epigraphic genre», even in its «specificity», can be compared to the aphoristic genre on the basis of «brevity», as well as «pregnancy of meaning»⁵⁸. The inscriptions cannot be too long, otherwise passers-by will not be enticed to read them; concision therefore determines communicative success. The extent of this textual typology, which is also usually defined as *short inscriptions*, is however highly variable: from intentionally sparse, almost telegraphic writings, to others that are longer. We mention, as a sample of a concise epigraphic expression, the plaque in Catania at the birthplace of Giuseppe Lombardo Radice in Via Vittorio Emanuele II (5).

(5)

A
GIUSEPPE LOMBARDO RADICE
PEDAGOGISTA
NEL CENTENARIO DELLA NASCITA
IL COMUNE DI CATANIA
POSE
1879 1979⁵⁹

The stylistic uses of the epigraphic genre – as we shall see shortly – are suited to the solemnity of public commemoration: «That behind most inscriptions is a desire to secure a long life for the message they contain is not in doubt: ‘words for all time’ they have been called. [...] behind the inscribing of *tituli*⁶⁰ lies a quest for eternity»⁶¹. The main goal pursued by epigraphic communication is to honour merit and immortalize memory; however, on closer inspection, in a more or less clear manner, the task of the inscriptions also seems to be to enhance the collective formations of which the commemorated individual was or is reputed to be a member, be they work places, professional groups or territorial entities at local or national level. I am thinking of an example from Rovigo, in Corso del Popolo, on the façade of Palazzo Montalti: the plaque in praise of Erminia Fuà Fusinato⁶², placed on the wall in 1934, fifty-eight years after her death,

⁵⁸ B. Mortara Garavelli, *Textsorten / Tipologia dei testi*, in G. Holtus, M. Metzelin, C. Schmitt (edd.), *Lexikon der Romanistischen Linguistik (LRL)*, Tübingen, Niemeyer, 1988, p. 162.

⁵⁹ To / Giuseppe Lombardo Radice / educationalist / on the centenary of the birth / the municipality of Catania / placed (this plaque) / 1879-1979.

⁶⁰ *Titulus* is the Latin term for inscription.

⁶¹ Panciera, *What is an Inscription?*, cit., p. 3 [italics in text].

⁶² See the report of M.C. Leuzzi in G. Chiosso, R. Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, Milan, Editrice Bibliografica, 2013, p. 591.

on the basis of the fascist leitmotiv of the unfinished Risorgimento; in fact, in addition to being a *poetess* (she composed verses inspired by love of family and country) and *educator* (she held teaching, inspection and managerial positions), this nineteenth-century figure was a *patriot* (she collaborated with her husband Arnaldo Fusinato in the struggle for the anti-Hapsburg cause); moreover, the moderate emancipationism of Fuà – whose demand for the cultural elevation of women, made without denying their role in family care, was not accompanied by the claim of political rights – was in accordance with the fascist female ideal (6).

(6)

XXVII APRILE MCMXXXIV – XII E.F.

 NEL CENTENARIO DELLA NASCITA
 ROVIGO
 AUSPICE L'ISTITUTO TECNICO
 RICORDA LA CONCITTADINA
 ERMINIA FUÀ FUSINATO
 PATRIOTA – POETESSA – EDUCATRICE

 ROVIGO 1834 – ROMA 1876⁶³

In the text, placing the name of the commissioning party before that of the dedicatee makes the Edmondo De Amicis Technical Institute co-protagonist of the epigraphic celebration due to the solicitude in remembering, in representation of the Rovigo community, a fellow citizen so worthy of praise.

Sometimes the commissioning body tends, especially in the shortest epigraphs, to steal the show from the dedicatee, testifying to the self-referential value of public commemorative practices for the *milieu* of the deceased person. For example, the Brescia plaque in honour of Giuseppe Cesare Abba, inaugurated in the Castle in 1926⁶⁴, bears a two-part inscription⁶⁵: the first sentence refers to the role of the dedicatee as a participant in the Garibaldi's Thousand enterprise, author of writings inspired by the Risorgimento, teacher and then dean at the Tartaglia Technical Institute in Brescia⁶⁶; the second goes beyond the commemorative theme towards patriotic concerns that reiterate, after the

⁶³ XXVII april MCMXXXIV – XII f.e. / on the centenary of the birth / Rovigo / under the initiative of the Technical Institute / remembers the citizen / Erminia Fuà Fusinato / patriot – poetess – educator / Rovigo 1834 – Rome 1876.

⁶⁴ P. Corsini, P. Zane, *Storia di Brescia: Politica, economia, società 1861-1992*, Roma-Bari, Laterza, 2014, p. 264.

⁶⁵ To complete the writing, the stone artefact frames a half-length portrait in bronze bas-relief with Abba at the top, caught in the gesture of leafing through a book, with battle scenes in the background, to visually represent the figure of the fighting master «with the word» and «by example».

⁶⁶ See the report of D. Montino in Chiosso, Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. I, p. 3.

disappointment of the *mutilated victory*, the unsolved irredentist claims over Italian lands still in the hands of the foreigner (7).

(7)

A
GIUSEPPE CESARE ABBA
SOLDATO POETA MAESTRO
CON L'ESEMPIO CON LA PAROLA
ADDITÒ AI GIOVANI LE ALPI NOSTRE⁶⁷
LA GENERAZIONE BRESCIANA
ILLUMINATA ALLA LUCE DELLA SUA FEDE
RIVENDICA I SACRI CONFINI⁶⁸

Stylistically, in accordance with the hagiographic purpose, be it direct or reflected, the language used for inscriptions is select, if not decorative; the text, therefore, is formalized in a high register, sometimes evoking Carducci or D'Annunzio. The epigraphic wording, in the presence of low levels of education, may not be immediately decipherable; sometimes the language barely allows the contents to be understood or even remains cryptic, in defiance of – and perhaps precisely to underline – cultural disparities. As an example of the refinement of epigraphic language, I quote the Bolognese inscription for Assunta Viscardi, a Dominican tertiary and teacher, who was committed to socially and educationally supporting disadvantaged children under the auspices of the Opera di San Domenico for the Sons of Divine Providence, which she founded; she also inspired a structure of charitable service for the poor, la Porticina della Provvidenza⁶⁹; the plaque is at the elementary school in Via Lorenzo Bartolini where the lay nun taught (8).

(8)

MAESTRA D'AMORE AI FANCIULLI
SORELLA AI DOLENTI AI TRISTI AGLI IGNUDI
ASSUNTA VISCARDI
TRAENDO DALLA FEDE E DAL DOLORE POTENZA D'ASCESA
TOCCÒ LUMINOSI VERTICI DI EROICA BONTÀ
FONDATRICE PIETOSA D'ASILO AI REIETTI
FU ESEMPIO DI GIUSTIZIA E VERITÀ SOCIALE
ADDITANDO CON LE VIRTÙ SUE PRECLARE
LE METE SUPREME DELLA VITA
11 AGOSTO 1890 – 9 MARZO 1947⁷⁰

⁶⁷ *Le Alpi nostre* – i.e. *Our Alps* – is a reader that Abba wrote for elementary schools.

⁶⁸ To / Giuseppe Cesare Abba / soldier poet teacher / by example and word / he pointed our Alps out to our youth / the Brescian generation / illuminated by the light of his faith / claims the sacred borders.

⁶⁹ See the report of M. D'Ascenzo in Chiosso, Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. 2, p. 656.

⁷⁰ Teacher of love to children / sister to the suffering to the sad to the naked / Assunta Viscardi

The recourse to literary adjectives (*ignudi*/naked; *reietti*/outcast; *preclari*/excellent), the omission of the indefinite article (*d'asilo* instead of *di un asilo*), the qualifying adjective going before the noun (*luminosi vertici*/luminous vertices; *eroica bontà*/heroic goodness) and the displacement of the possessive adjective after the noun (*virtue sue*/her virtues) are all lexical and syntactic peculiarities that exemplify distance from the current written language.

It has been said how Italian, after Unification, ousted Latin as the language of epigraphy. Nonetheless, inscriptions may still be in Latin, even in places accessed by an uneducated public. The limited number of those who are able to understand the text is of no importance; the signal that these epigraphs convey can be grasped by anyone who can guess, beyond any verbal decoding, the implications of cultural superiority: the use of an ancient and obsolete language is communication to the extent that, in addition to attesting the intention of self-affirmation and distinction of power structures, it reinforces the sense of inadequacy of the masses. The plaque in Fara in Sabina, a town in the Rieti area, in Piazza Giuseppe Garibaldi, in honour of Lorenzo Rocci – a Jesuit, teacher at the Tusculano College of Mondragone in Frascati, author of a very famous Greek-Italian dictionary⁷¹ – is testament to an inveterate teaching tradition which, geared towards promoting classical antiquity, prioritised the study of Latin in the education of the ruling classes: initiation into the mysteries of Cicero's language was the *sine qua non* of membership to the elite; conversely, exclusion from this knowledge was equivalent to social subordination (9).

(9)

LAURENTIVS ROCCI S.J.⁷²
RELIGIONE AC PIETATE CONSPICVVS
HVMANARVM LITTERARVM PRAECLERISSIMVS MAGISTER
QUAM PLVRIMOS IN TERRIS DEGENS
CHRISTIANA VIRTUTE ATQVE INGENVIS IMBVIT STVDIIIS
AD CAELITES EVECTVS
NATALI LOCO
CVIVS PERINSIGNE DECVS EXSTITIT
ADHVC PERAMANTER ADEST
EIVSQUE NOMEN PER AEVVM HONESTAT
MDCCCLXIV – MCML⁷³

/ drawing the power of ascent from faith and pain / touched the luminous vertices of heroic goodness / pious founder of a shelter for outcasts / she was an example of justice and social truth / pointing with her excellent virtues / the supreme goals of life / 11 august 1890 – 9 march 1947.

⁷¹ See F. Rizzi, *Rocci, il greco tiene banco*, «Avvenire», 21 June 2006, p. 31.

⁷² Abbreviation of Societas Jesu, i.e. Society of Jesus.

⁷³ Lorenzo Rocci s.j. / of notable religious sentiment and devotion / illustrious teacher of humanistic disciplines / in earthly life he taught as many as possible / the christian virtues and noble learning / elevated to heaven / in his birth place / to which he brought prestige / he is still permanently present / and bestows honour on its name for eternity / 1864-1950.

However, there is no lack of cases in which the text of the inscriptions is not sublimated in literary language, is direct in expression and simply offers itself to the understanding of the masses of the recipients. An example of essentiality of form and content is the stone memory of Francesco Costa, a teacher with socialist ideas who, deported to Mauthausen, died in the Gusen concentration camp sub-unit⁷⁴; the artefact is located in the Cuneo area, in the teacher's home town, inside the elementary school, named after him, where he had worked (10).

(10)

IN QUESTO EDIFICIO
IL MARTIRE MAESTRO
DOTT. PROF. FRANCESCO COSTA
ISTRUÌ ED EDUCÒ
CON FEDE E AMORE

TORINO 1889 – CUSEN⁷⁵ (AUSTRIA) 1944

SALUZZO 1954⁷⁶

Whatever the register, the inscriptions, strengthened by their consecration on durable materials, exhibit an ideological monolithism with no question of discussion, to the point that, in Sartori's opinion, a complete and thoughtful understanding is not necessary; an approach based on *veloci percorrere oculo* – i.e. at a glance – is already effective in communicative terms. The scholar writes that it was enough

to see a text in order to recognize, intuit, imagine what was already known, or to glide over it in order to grasp its reason among a few isolated cornerstones that had the strength and authority to impose themselves on an otherwise indistinct text, due to an intrinsic selective predisposition⁷⁷.

Fixed on stone supports, the epigraphs have, by their very constitution, all the air of reflecting an imperishable truth; upper case letters also contribute to creating this rhetorical effect: the choice of capitalizing the text gives each inscription the didactic tone of a maxim. Writing on conceptually eternal surfaces, because its ideological connotation of absoluteness, has psychological effects on the public that Susini summarizes as follows: «The persuasion of the

⁷⁴ See A. Bravo, D. Jalla, *La vita offesa. Storia e memoria dei lager nazisti nei racconti di duecento sopravvissuti*, Milan, FrancoAngeli, 1987, p. 202.

⁷⁵ Contrary to what the stoner has recorded, the place of death is Gusen.

⁷⁶ In this building / the martyred teacher / dr. prof. Francesco Costa / taught and educated / with faith and love / Turin 1889 – Cusen (Austria) 1944 / Saluzzo 1954.

⁷⁷ A. Sartori, *L'impaginazione delle iscrizioni*, in *Acta colloqui epigraphici Latini Helsingiae* 3-6. Sept. 1991 *habiti*, Helsinki, Societas Scientiarum Fennica, 1995, pp. 193-194.

importance» of what is written and, «consequently, the sense of security that emanates from the *monimentum*»⁷⁸.

The date of placement of the memorial tablet can be explicitly stated in the epigraphs or it can be derived from formulas in the text that indicate the anniversary for which the stone memory was conceived. However, there are cases where the indication of the time when the plaque was placed is missing – in this regard, see the example (5); a precise chronological reference can only be found through specific searches of archival and printed documents. «The frequent absence of dating has», according to D'Achille, «a precise textual functionality, as it frees the epigraph from a defined temporal situation and places it in a sort of a-temporality that enhances its character of stability»⁷⁹.

The use of spatial deixis is also typical of the text of the inscriptions; in other terms, the epigraphic wording can contain expressions that refer to the place where the plaque is located: the so-called exophoric spatial deixis serves to justify the presence of a writing in the context of location. The epigraphs are inextricably linked to the space in which they are inserted, so much so that, if decontextualized, they are deprived of a non-negligible part, if not all, of their meaning⁸⁰: here is the very frequent use of the adverb *qui* (here) or the demonstrative adjective *questa* (this) in front of *casa* (house), followed by the verbs *nascere* or *vivere* (to be born or to live); the same goes for *questo* (this) prior to *istituto* (school), associated with the verbs *insegnare* or *fondare* (to teach or to found). The recurring position of the spatial references at the opening of the epigraphs confirms their thematic importance. This textual structure can be found in the stone memory of Ada Negri outside the sacristy of the Church of San Rocco, the poetess' first teaching place in Motta Visconti in the Milan area (11).

(11)

QUI
LA POETESSA D'ITALIA
ADA NEGRI
“MAESTRINA DI MOTTA VISCONTI”
INSEGNÓ
DAL 1888 AL 1890⁸¹

⁷⁸ G.C. Susini, *Le scritture esposte*, in G. Cavallo, P. Fedeli, A. Giardina (edd.), *Lo spazio letterario di Roma antica*, Vol. II. *La circolazione del testo*, Rome, Salerno Editrice, 1989.

⁷⁹ D'Achille, *Parole: al muro e in scena*, cit., p. 133.

⁸⁰ Although photographic documentation is of fundamental support to the study of lapidary production, only *field work*, typical of the archaeologist, facilitates full understanding of how the exposed writings function.

⁸¹ Here / the poetess of Italy / Ada Negri / 'the schoolmistress of Motta Visconti' / taught / from 1888 to 1890.

In this as in other examples, the effect of the writing also seems to celebrate the place that hosted the remembered personality, by birth or activity, based on a dynamic of assimilation of the prestige of the dedicatee.

On other occasions, the position in the first line is given to the commemorated person based on the normal SVO order of the Italian sentence, without however decreasing the value ascribed to the spatial situation, with consequences in terms of enhanced reputation for the commissioning body. A relevant example is the plaque which, in praise of Raffaello Marchesi, also called Raffaele, was inaugurated on 13 September 1908 in Magione, in the Perugia area, along the road that was later named after him⁸². Without attempting to dissimulate, the epigraph, dictated by the Honourable Guido Pompilj⁸³, joins the memory of Marchesi – in whom the priestly mission, the role of secondary school teacher, the scholarly activities and the patriotic spirit converge⁸⁴ – to the *prestige* that he brought, and still brings, to *this land of Magione that gave him birth* (12).

(12)

RAFFAELLO MARCHESI
DOTTO LATINISTA
MAESTRO VALOROSO
PRETE CONCILIANTE
VOMO PROBO
ONORÓ
QUESTA TERRA DI MAGIONE⁸⁵
CHE GLI DIÈ I NATALI
E NE VVOL QUI PERPETVATA LA MEMORIA
A LVSTRO ED ESEMPIO⁸⁶

There are often spatial references to the slab itself, indicated as *questa lapide* (this plaque) o *questo marmo* (this marble) o *questa memoria* (this memorial) o *questo ricordo* (this memory); the so-called endophoric spatial deixis, as is already clear from the commemorative plaque of De Sanctis (2), can be further documented with a Roman example, dating back to 1924, in the atrium of the Goffredo Mameli Elementary School (13).

⁸² See *L'abate Raffaele Marchesi commemorato a Magione sua terra natale*, «Archivio storico del Risorgimento umbro, 1796-1870», vol. IV, n. 1, 1908, p. 259.

⁸³ The editor of the text, like the aforementioned Guido Pompilj, usually remains anonymous, or in any case is almost never reported on the plaque; the name of the author of the inscription can be recovered through research on archival and printed sources.

⁸⁴ See the report of D. Montino in Chiosso, Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. 2, p. 96.

⁸⁵ Here the spatial deictic procedure involves the entire Umbrian town.

⁸⁶ Raffaello Marchesi / learned latinist / valuable teacher / conciliatory priest / and upright man / who honoured / this land of Magione / that gave him birth / and wanted to perpetuate his memory here / as a source of prestige and an example.

(13)

LA SCUOLA CHE SI INTITOLA
DAL NOME DEL POETA SOLDATO D'ITALIA
SI TRAMUTÒ NEGLI ANNI DAL 1915 AL 1918
IN ASILO OSPITALE DEI GLORIOSI FERITI
DELL'ULTIMA GUERRA D'INDIPENDENZA

MAESTRI E ALUNNI
IN COMUNIONE D'AMORE PATRIO
AUSPICE IL COMITATO DI VIGILANZA DELLA SCUOLA
QUESTO RICORDO POSERO
4 MAGGIO MCMXXIV⁸⁷

The second sentence of this text closes with the spatial deictic phrase *questo ricordo posero* (placed this memorial). It should be noted that the remembrance of the conversion of the school structure into a *hospital for the glorious wounded* offers the pretext for inculcating the myth of the *last war of independence* in order to legitimize the senselessness of war.

There are innumerable cases in which the references to the artefact are elliptical: within a recurring concluding formula in the inscriptions, the verb *porre* (to place), typical of epigraphic language, has almost always the object, the plaque in fact, implied; in this regard I cite the example (5) – IL COMUNE DI CATANIA / POSE (THE MUNICIPALITY OF CATANIA / PLACED). After all, the phenomenon of ellipsis is frequent in the texts of the epigraphs: returning to the final sentences of the examples (1) LA GIVNTA MVNICIPALE DI PISA / ALL'ALBA DELLA LIBERTÀ / INTERPRETANDO I SENTIMENTI / DELLA CITTADINANZA (THE MUNICIPAL COUNCIL OF PISA / AT THE DAWN OF FREEDOM / INTERPRETING THE SENTIMENT OF THE TOWNSPEOPLE) and (3) L'IRPINIA / NEL CINQUANTENARIO DELLA MORTE (IRPINIA ON THE FIFTIETH ANNIVERSARY OF THE DEATH), in both cases the verb and the object are omitted.

The commissioning body, quite often the Municipality of the locality where the memorial tablet is located, appears quite frequently in the inscriptions; this information is at the end of the text, in a separate sentence or as a signature, sometimes after a line break, as if to highlight its role. The commissioner mentioned may be real or ideal: in this regard, I mention the previous examples: (1) LA GIVNTA MVNICIPALE DI PISA and (3) L'IRPINIA.

⁸⁷ The school bearing the name / of the poet soldier of Italy / was converted in the years 1915 to 1918 / into the hospital of the glorious wounded / of the last war of independence / teachers and students / in a shared love of homeland / under the initiative of the supervisory committee of the school / placed this memorial / 4 may MCMXXIV.

4.2. *Plastic medium*

With regard to plastic monuments, the sculptural work consists of a half-length or full-length portrait of the commemorated figure; in-the-round representations in marble or bronze are flanked by architectural elements, such as basements, columns, aedicules or niches. The material requirements for identifying epigraphic artefacts – exposition (which is associated with involuntary reception), singularity, fixity, permanence over time – are also valid for sculpted productions.

More than the exposed writings, sculptural memorials, in the absence of verbal signs, activate a sort of cultural unconscious: the plastic expression operates to instil in imperceptible way learning, knowledge, a way of thinking; watchful use is not necessary for the monumental narrative to succeed in educating the masses; lack of reflection is proper to the reception of statuary art: seeing plastic narrative texts «transform into habit, common sense, natural landscape, is not a bad result, from the point of view of those who historically manage the [monumental] code and contents of the code, as they define presences and absences, cover-ups and priorities»⁸⁸.

Historically, the beginning of the plastic exaltation of the country's splendors dates back to the second half of the nineteenth century: «With the capture of Rome the period of the Risorgimento struggles ended and the era of the monuments began»⁸⁹; then, in the eighties and nineties of the nineteenth century, the plastic modelling of anthropic space, in displaying the features of personages from the past, assumed the proportions of a sculptural hypertrophy; publicly exposed statues played

a decisive role in reflecting the various complex political, ideological and cultural inclinations of the new national state for which the characters represented affirmed the specific function of *exempla virtutis*; the monument consequently reflected an eternal reward to them⁹⁰.

As a symbol of principles of ethics and social respect, these sculptures, even when they do not lack aesthetic quality, do not have the characteristic of detachment from social reality: they are, in fact, monuments placed in public spaces as moral points of reference; in entrusting memory to the expressive power of statues, monumentalism «implicitly refers to general and supreme

⁸⁸ Isnenghi, *Alle origini del 18 aprile*, cit., p. 173.

⁸⁹ L. Berggren, L. Sjöstedt, *Monumenti e politica monumentale a Roma*, Rome, Artemide, 1996, p. 1.

⁹⁰ T. Casini, *Il ritratto tra riscoperte e patriottismo, Identità nazionale e memoria storica. Le ricerche sulle arti nella Nuova Italia (1870-1915)* [Atti del I Convegno nazionale della Società di Storia della Critica d'Arte, Bologna, 7-9 November 2012], monograph of the «Annali di Critica d'Arte», vol. IX, n. 2: *L'organizzazione delle Belle Arti, l'arte per il pubblico*, 2013, pp. 568-569.

values; the memory of the person is a way of making concrete the exaltation of virtues that are the norm for society»⁹¹.

According to Alberto Mario Banti, in-the-round portraits, made after the death of the immortalized figures, can be defined, despite being placed outside cemeteries, as funereal statues that «are scattered everywhere, in the heart of cities and villages, [...] displayed daily for everyone to see». The presence of these three-dimensional images of the dead

aims to define the national community as a community in which the boundary between the living and the dead is, to a certain extent, erased: the dead have the right to remain permanently amid the hustle and bustle of daily life in the middle of the squares, at the heart of the cities, if they are particularly deserving of honour for their love for the homeland and their readiness to sacrifice themselves for it. And this is because everyone, absolutely everyone, must remember their deeds, and – as far as possible – follow their example⁹².

The realism of the portraiture, typical of late nineteenth century *statuemanìa*, persisted until the 1920s⁹³ and is reflected in meticulous forms; care in very personalized portraiture involved communicating to the masses the historical significance of the commemorated figure: the face – shaped, at least in the artist's mind, so as to be visually expressive of the personality traits of the deceased – was unique and recognizable, with the inimitable lines of the lips, nose and eyes; rendered in detail, the clothing, sometimes accompanied by professional symbols, indicated the social environment to which they belonged. An example of plastic adherence to the likeness of a commemorated figure is the bust of Tullio Buzzi, who headed the School of Chemistry, Dyeing and Weaving in Prato until his death in 1927, making it a major centre of chemical-textile culture (Pic. 2); dedicated by the alumni as a sign of gratitude, the bronze bust was inaugurated on 15 January 1928 at the school he had directed⁹⁴, which, immediately after he died, was named after him, in recognition of the important role played by this *distinguished master of doctrine and life*, in the words of the inscription on the base of the effigy (14).

⁹¹ R. Basaglia, *Monumenti come testimonianza e memoria*, in Petrantoni, *Memorie nel bronzo e nel marmo*, cit., p. 113.

⁹² A.M. Banti, *Sublime madre nostra. La nazione italiana dal Risorgimento al fascismo*, Rome-Bari, Laterza, 2011, p. 67.

⁹³ The political need to rework the mourning of the Great War led to the right of public commemoration being extended to the fallen; sculptural expression therefore moved towards sanctification of the war epic. Statues of personages from civic life underwent a contraction which caused the search for verisimilitude to be gradually replaced by the aesthetic tendency to stylization.

⁹⁴ See «Il notiziario chimico-industriale. Rivista internazionale di chimica», vol. III, n. 3, March 1928, p. 173.



Pic. 2. Bust of Tullio Buzzi (1928), by Donato Gramegna, in the atrium of the institute of the same name in Prato (Photo: Gemma Moretti)

(14)

A
TULLIO BUZZI
DI DOTTRINA E DI VITA
MAESTRO INSIGNE
I DISCEPOLI

15 GENNAIO 1928⁹⁵

⁹⁵ To / Tullio Buzzi / an illustrious master / of doctrine and life / his disciples / 15 January 1928.

As we read in an article that appeared in «Il notiziario chimico-industriale» in March 1928, at the inaugural ceremony, «the soul of those present» – including the «Family», the «Authorities», «the students and the alumni», the latter «arrived from every part of Italy to pay homage» – was filled «with emotion [...]»; especially since the resemblance of the bust, a work of art executed with passion and intellect by the artist Prof. Donato Gramegna, is truly impressive»⁹⁶. In Buzzi's sculptural representation we can see the typical characteristics of the figure of the excellent teacher, as rooted in common opinion: intellectual rigour and moral rectitude combined with a disguised «paternal affection»⁹⁷.

4.3. *Complexity of monumental phenomenology*

As can be seen from the Prato example just discussed, epigraphs are not always autonomous, completely devoid of a figurative context; in the same way, plastic works are not always pure, without any verbal presence; hybridization is very frequent. Sometimes, inscriptions include decorative motifs, symbols or the relief effigy of the face of the commemorated individual; these elements are intended either to clarify and strengthen the meaning of the verbal message or to draw attention to it; however, it is the writing that prevails. At other times, epigraphs on plaques, basements and columns accompany the sculptures; in such cases, the writings act as a legend with respect to the power of the three-dimensional images. As the linguist Francesco Sabatini states, some inscriptions «in symbiosis with a figurative text» can however «take on a life of their own», others «are functional to a figurative text» which «represents the clearly prominent part of the whole»⁹⁸. With regard to the epigraphic-monumental relationship, that is, the percentage of the monumental surface occupied by the inscription, we can say that the role of the verbal text is the key element in the first case and complementary or supplementary to the statue in the second; obviously, the more extended the epigraphs are, the more they are linguistically and historically interesting.

⁹⁶ «Il notiziario chimico-industriale», cit., p. 173.

⁹⁷ *Ibid.*

⁹⁸ F. Sabatini, *Italia linguistica delle origini. Saggi editi dal 1956 al 1996, 1997*, 2 vols., Lecce, Argo, 1997, Vol. II, pp. 570-572.

5. *Monumentalizing the school past*

Concerning studies on historical-educational heritage⁹⁹, what I have defined as the *monumental archaeology* of the school imaginary introduces, in the observation of the symbolic production related to education, a hitherto never considered visual angle. With explicit reference to Michel Foucault, Cristina Yanes-Cabrera and Agustín Escolano have postulated, with reference to school materials, an archaeology of memory:

The enhancement of memory as a source of knowledge of school culture invites us to conduct an archaeological immersion into the things, icons, and languages in which the material issues of education and their representations are manifested. [...] Discussing these materials leads to opening the memory that is inserted into them and intuiting the discourses that have constituted it¹⁰⁰.

With this contribution, the scope of investigation of the archaeological approach, which is typical of the historiographical trends focusing on the material culture of school, is extended to epigraphic and plastic assets.

A study of the public memory of the social institution formally delegated to education shows that the school can be told through the epigraphic and plastic modes of production of the imaginary. Monuments, with their capacity for exhibition unknown to any other document, express the intention of power to impress on the collective mentality: the monumental narrative of the school past is not a novel or a play; it is real insofar as it is aimed at preparing the masses to look at school through the lens of officialdom. According to the interpretation that Fabio Targhetta applies to the organization of the urban landscape, the monumental devices, «if duly questioned, can reveal many aspects linked to the values of the ruling class, to how it intended to convey them to all citizens [...]»¹⁰¹: plaques and statues, as instruments of memory bearing the mark of hegemony, reflect the political-cultural vision of the school of which the rulers are the bearers. As Halbwachs argues,

every phase of the group can be translated into spatial terms, and its residence is but the juncture of all these terms. Each aspect, each detail, of this place has a meaning intelligent only to members of the group, for each portion of its space corresponds to various and different aspects of the structure and life of their society¹⁰².

⁹⁹ See J. Meda, *La conservazione del patrimonio storico-educativo: il caso italiano*, in J. Meda, A. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España: presupuestos y perspectivas. Actas del I workshop Italo-Espanol de Historia de la Cultura Escolar (Berlango de Duero, 14-16 November, 2011)*, Macerata, eum, 2013, pp. 167-198.

¹⁰⁰ C. Yanes-Cabrera, A. Escolano Benito, *Archaeology of Memory and School Culture: Materialities and “Immaterialities” of School*, in Yanes-Cabrera, Meda, Viñao, *School Memories*, cit., p. 266.

¹⁰¹ Targhetta, *Un paese da scoprire, una terra da amare*, cit., p. 137.

¹⁰² Halbwachs, *The Collective Memory*, cit., p. 130.

Hence, epigraphic and plastic artefacts, as externalizations in the anthropic space of the commemorative will of elites, constitute an object of study for the understanding of the forms, which are variable over time, of the official representation of school phenomenology.

The manifestation of the official idea of formal education can be traced on the basis of a survey of key issues of the cultural history of schooling that differ for representational specificities; without claiming to be exhaustive in historiographical terms, I chose an exposition based on some cases that I have considered to be thematically relevant.

The dedication of epigraphic and plastic artefacts to figure of the school past is a testament to the role attributed by rulers to formal education as a system of cultural penetration. In post-unification Italy, the purpose of education was to select the cultural contributions to be transmitted to the new generations in a way that could be functional to social continuity:

Under state management, identities had to be an outcome of planned, managed, 'rational' action. The imparting of beliefs, attitudes and behavioural patterns had to be problematized and structured as *education* (and, more generally, *culture*), run by the expert agents appointed and empowered by the state¹⁰³.

Universal education permits the training of all inhabitants of the state territory in the values of the national formula promoted by the state: to make them 'born' patriots, and so to accomplish in practice what has been claimed in theory, namely the 'naturalness' of nationality. The combined effect of education, of ubiquitous though diffuse cultural pressure, and of state-enforced rules of conduct is the attachment to the way of life associated with the 'national membership'¹⁰⁴.

Bauman's words show the importance of schooling as a decisive tool of social self-preservation.

While the processes of integration in post-unification social order were entrusted to education specialists, acts of public commemoration were not distributed indiscriminately: death is the norm, but perpetuation in memory can only be achieved as an exception. The name of some personalities is imprinted on epigraphic and plastic narrative texts; in remembrance of others, however, the need to solicit public attention is not felt; for the former the doors of the theatre of immortality are opened; the latter sink into monumental oblivion. What are the criteria for participation in the monumental narrative? What makes the difference is the value assigned to the occupations of the deceased: what makes people say that *s/he made history* is the socially recognized excellence of the educational work. The *leading players* in education, are not examples of the whole of the school system. The monumental testimonies in tribute to educational glories do not, in fact, document the existence of deficiencies in

¹⁰³ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 99 [italics in text].

¹⁰⁴ *Ibid.*, p. 152.



Pic. 3 Bust in high relief of Giuseppe Sacchi (1909), by Achille Alberti, emerging out from a plaque placed on the entrance staircase of the Braidense National Library in Milan (Photo: Giovanni Dall'Orto)

schooling. Each artefact, precisely because it is the result of a selection based on merit, is an manifestation of the desire to bring to the public attention an idealization of the school. As an expression of superior quality in educational art, I give a Milanese example, on the entrance staircase of the Braidense National Library: the bronze bust of Giuseppe Sacchi, a work by the sculptor Achille Alberti, emerges in high relief from a plaque; in 1909, eighteen years after his death, the «amiable educator», called *Papà Sacchi* «for his affection for the children» «who adored him», was honoured with this memorial at the Brera Library, of which he had been director (Pic. 3)¹⁰⁵. According to the text of the inscription, this *distinguished pedagogue and educationalist*, who was committed to promoting the objective-experimental method in teaching, was an *indefatigable advocate* of infant education; this *first initiator* of an Aportian infant school in Milan worked until his death for the children of the masses (15)¹⁰⁶.

¹⁰⁵ *Onoranze a un amabile educatore. Giuseppe Sacchi*, «L'Illustrazione Popolare», vol. VI, n. 46, 3 January 1909, p. 763.

¹⁰⁶ See the report of S. Polenghi in Chiosso, Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. 2, pp. 448-449.

(15)

GIVSEPPE SACCHI
 PREFETTO DELLA BIBLIOTECA DI BRERA DAL 1860 AL 1876
 EDVCATORE E PEDAGOGISTA INSIGNE
 PRIMO INIZIATORE NEL 1835¹⁰⁷ POI PER 11 LVSTRI
 INFATICABILE PROPVGNATORE
 DEGLI ASILI DI CARITÀ PER L'INFANZIA IN MILANO
 1804 1891

A. ALBERTI
 1909¹⁰⁸

Results achieved in education are not, however, the only credentials for accessing posthumous attention. The dominant culture sets additional conditions to be examined for achieving a place in history. The hegemonic forces, because they oversee the definition of which acts are socially desirable, establish the behavioural requirements for designation as an object of public commemoration. The chances of having a place in the future memory therefore depend on positioning with respect to the present hegemony; like other socially distributed rewards, immortality can be granted or not – and if so, in smaller or larger quantities – depending on adaptation to socially prevalent values. Meeting social expectations fulfils the promise of perpetual presence in the memory contained in the formula *s/he is dead, but his or her work lives on*. As Bauman notes:

Society promised immortality: but it promised immortality as an interest on mortal life properly lived [...] At the price of conformity to its model of order, society offers the means which individuals may deploy to bind the future they will not be around to supervise and control in person¹⁰⁹.

The selective practice for recognition of suitability for public commemoration, therefore, uses the yearning for immortality at the service of the social order. In the matter of the exercise of social pressure on the educational role so that it is an instrument of conforming to the norm, we note the plaque located in the Pescara area, at the entrance to the Gennaro Finamore Middle School in Rosciano, in memory of Michele Marchianò, a Greek and Latin teacher at the Liceo Vincenzo Lanza in Foggia (16)¹¹⁰.

¹⁰⁷ In actual fact, the establishment of the first infant school in Milan by Giuseppe Sacchi dates back to 1836. See *Sugli asili di carità per l'infanzia in Milano*, «Annali universali di statistica, economia pubblica, storia, viaggi e commercio», vol. XLVII, March 1836, pp. 301-302.

¹⁰⁸ Givseppe Sacchi / director of Brera library from 1860 to 1876 / distinguished pedagogue and educationalist / first initiator in 1835 then for 11 years / indefatigable advocate / of charitable infant schools in milan / 1804-1891 / A. Alberti / 1909.

¹⁰⁹ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 53.

¹¹⁰ Michele Marchianò, who died in 1921, was also the author of studies on ancient Greek and Albanian literature, as well as on the dialect and popular poetry of northern Puglia. For biographical information, see the *Preface* to the anthology of the popular literature of the so-called

(16)

LA SCUOLA È LA PALESTRA DEL SAPERE
 MA ANCHE LA PALESTRA DEL DOVERE
 CHE CONDUCE ALLA VITA
 BENEMERITO L'INSEGNANTE CHE
 "MAGNA REVERENTIA PUERIS"
 SA RENDERE AGILE LA MENTE
 SVELTIRE L'INTELLETTO
 INGENTILIRE LO SPIRITO DEI GIOVINETTI
 DISCOPRENDO CIÒ CHE LA PATRIA
 DA LOR S'ATTENDE

Michele Marchianò¹¹¹

"...e del suo antico fuoco
 ciascun or prenda un tizzo"¹¹²

The text of the inscription – which incorporates a quotation from Marchianò in inverted commas – begins sententiously: *the school is the gym of knowledge but also the gym of duty that leads to life*; then, with an argument in which the consequences are not relevant to the premises, *to make the mind agile* is linked to success in social adaptation: *praiseworthy is the teacher who, "magna reverentia pueris"*¹¹³, *knows how to make the mind agile, quicken the intellect, refine the spirit of the young, showing them what the homeland expects of them*; with a logical leap, in the face of the declared «magna reverentia pueris», to make the teacher's work commendable is the uncovering to the young of *what the homeland expects of them*.

It must be said that the candidates for immortality could not effectively ensure the confirmation of a posthumous life without collaborating with the powers capable of validating the claims to eternity. Success in posthumous survival could not be achieved without social support because it is the established power – the ultimate owner of public spaces – that lays down the rules of monumental communication and plans the specific implementation of epigraphic and plastic artefacts¹¹⁴. We remember with Sabatini that the epigraphs, as well as the statues, whose placement

Capitanata that the scholar had collected: *Testi popolari di Capitanata. Canzoni, poesie e proverbi raccolti da Michele Marchianò*, Foggia, Atlantica, 1984, pp. IX-XII.

¹¹¹ This is one of the rare cases of italics being used in the text.

¹¹² The school is the gym of knowledge / but also the gym of duty / that leads to life / praiseworthy is the teacher who / 'magna reverentia pueris' / knows how to make the mind agile / quicken the intellect / refine the spirit of the young / showing them what the homeland / expects of them / Michele Marchianò / '...and from its ancient fire / let each now take an ember'.

¹¹³ *Magna reventia pueris* means *great reverence to children*.

¹¹⁴ See A. Petrucci, *Potere, spazi urbani, scritture esposte: proposte ed esempi*, in *Culture et idéologie dans la genèse de l'État moderne. Actes de la table ronde de Rome (15-17 October 1984)*, Rome, École Française de Rome, 1985, p. 89.

is made available (or at least endorsed) by a public authority (usually the Municipality is the body responsible for approving the affixation [or installation]), tend to put forward messages that are supposed to be universally shared or that in any case express the ideology of the dominant power or of a social or political group that is recognized or, at least, tolerated, by the dominant power¹¹⁵.

The hope of continuing to live in the spirit of posterity thus serves as a very powerful tool of disciplinary power.

The ruling circles were determined to create an institutionalized ceremonial system around epigraphic and plastic monuments that was able to meet the aspirations for social visibility of the upper strata of the bourgeoisie, the lower-middle classes and the elites of small provincial towns. As mentioned, inclusion in this post mortem reward scheme entailed adherence to the established order – «while giving form to the dream of immortality, [commemorative rites] deploy the dread of mortality [in terms of social oblivion] in the service of communal cohesion»¹¹⁶. The art historian Sergiusz Michalski has effectively illustrated the psychological effects produced in life from the perspective of posthumous monumental honours; the dedication of a plaque and even more of a statue – a widely publicized initiative, usually undertaken by one or more sponsoring committees and authorized by resolutions of government bodies – was interpreted as the recognition of a certain degree of glory for the deceased:

Many state functionaries and aspiring members of the bourgeoisie found in the erection of monuments a congenial field for meritocratic expression and self-enhancement. All this was crowned by the ceremony of unveiling – usually a great festive occasion, no less attractive than a première at the Opéra. Such events were highlighted not only in the political sections of the journals but also in the newspapers' social and gossip columns. To address the gathering during an unveiling was a much coveted honour¹¹⁷.

For the purpose of the pompous celebration of the deceased, explains Mirella D'Ascenzo, an authentic ritual structure was put in place, «including inauguration ceremonies, speeches by authorities, the placing of epigraphs or commemorative stones or other forms of monument [...]: a peculiar choreography, a theatrical performance, which sought to build a collective sense of belonging to the community»¹¹⁸. As an example of the attraction exerted by the election as protagonist of the official ritualization of memory, I offer the brief yet significant description, in the «*Bollettino della Società nazionale per la storia del Risorgimento*», of the commemoration ceremony of Giovanni

¹¹⁵ D'Achille, *Parole: al muro e in scena*, cit., p. 126 [the text in square brackets is mine].

¹¹⁶ Bauman, *Mortality, Immortality and Other Life Strategies*, cit., p. 53 [the text in square brackets is mine].

¹¹⁷ S. Michalski, *Public Monuments. Art in Political Bondage 1870-1997*, London, Reaktion Books, 1998, p. 29.

¹¹⁸ D'Ascenzo, *Collective and public memory on the walls*, «History of Education & Children's Literature», cit., p. 635.

Pennacchi, patriot of the Risorgimento, poet, holder of a variety of teaching and school management positions, rector of the University of Perugia¹¹⁹:

On 26 September [1911], Bettona, in Perugia, solemnly honoured its illustrious fellow citizen Giovanni Pennacchi, on the occasion of the centenary of his birth [28 years after his death]¹²⁰. At the inauguration of the marble plaque with a bronze effigy, affixed to the façade of the town hall¹²¹, the speakers were first the mayor of Bettona, Mr. Fedeli, then the prefect of Umbria, representing the minister of education, and finally prof. Biordo Brugnoli¹²².

The presence of this *parterre de rois* leaves no doubt about the political connotation of the event.

The memory of educational figures, as it can be traced back to a variety of social situations, is complex. Very often, public commemoration, rather than being exhausted in the praise of educational achievements, covers the entirety of the biography of the deceased; other equally laudable facets of the social personality of those commemorated can thus be brought to light. The monumental celebration of the school's memorable ones is joined by the sanctification of all social institutions, not just that specialized in education; since the preservation of cultural memory as a whole is at stake, public commemoration contributes overall to the promotion of the *weltanschauung* that society strives to perpetuate¹²³. The monumental sources of school memory, therefore, are documents for the analysis of other behavioural imperatives, supplementing the normative cogency of dedication to education: family care, religious devotion, philanthropic commitment, love for science, loyalty to Italy, heroism in war, sacrifice for the homeland. Virtuosity in educational works, therefore, is part of the overall conduct requirements that underpin the civic spirit of Italian. In general, the goal of the monumental narrative is to build

¹¹⁹ I consulted the entry *Giovanni Pennacchi* in *Dizionario Biografico degli Italiani* online version: <[http://www.treccani.it/enciclopedia/giovanni-pennacchi_\(Dizionario-Biografico\)/](http://www.treccani.it/enciclopedia/giovanni-pennacchi_(Dizionario-Biografico)/)> (last access: 10.07.2020)

¹²⁰ In fact, the centenary of Pennacchi's birth was on 17 June, 1911. Evidently, the public commemoration could only be held on 26 September of that year.

¹²¹ The text of the inscription is as follows: XVII giugno MDCCCCXI / nel primo centenario dalla nascita / di / Giovanni Pennacchi / gloria dell'Umbria vanto d'Italia / Bettona sua patria / auspicî municipi scuole e privati cittadini / volle qui eternata nel bronzo / la figura luminosa / del patriota del letterato dell'educatore. – XVII June MDCCCCXI / on the first centenary of the birth / of / Giovanni Pennacchi / glory of Umbria pride of Italy / Bettona his homeland / under the initiative of municipalities schools and private citizens / wanted here to immortalize in bronze / the luminous figure of the patriot, man of letters and educator.

¹²² *Bettona a E. Pennacchi*, «Bollettino della Società nazionale per la storia del Risorgimento», vol. I, n. 2, 1912, p. 188 [the text in square brackets is mine].

¹²³ See V. Zorić, *Funeral memories as a form of promotion of the value system and contributions of important protagonists in the area of development of education in Montenegro*, in Meda, Pomante, Brunelli, *Memories and Public Celebrations of Education in Contemporary Times*, cit., pp. 295-314.

the nation as a community of memory in which the exemplary presence of the dead serves as a source of education for the living: the public commemoration of every life spent in responding to duty in all its forms is a symbolic strategy that concretely responds to the need to build the *national character*. Because the use of epigraphic and plastic works is politically geared towards contributing to the formation of the good citizen, the study of the school memory through monumental traces allows us to follow the traces of *making the Italians* from Unification onwards;

from the moment that the landscape [once monumentalized] is loaded with meanings, expectations, non-neutral projections, which can also be moulded for educational goals, there follows the possibility of investigating the political use that over the decades the ruling classes have made of the landscape heritage for the purpose of forming national identity¹²⁴.

Emblematic of the project of national identity *bildung* is a Brescia example, in Corso Giacomo Matteotti, on the façade of Palazzo Bargnani, seat of the Tartaglia Technical Institute until 1969: the memorial tablet of Giuseppe Cesare Abba, whose name has already been mentioned in relation to another artefact (7), bears at the top, within a medallion, in bas-relief, the profile portrait of the commemorated (17).

(17)

GIVSEPPE CESARE ABBA
DELLA EPOPEA GARIBALDINA
MILITE E POETA
PER OLTRE CINQUE LVSTRI
IN QVESTO ISTITVTO
STRINSE LA LIBERA ANIMA SVA
ALLA ARDENTE ANIMA GAGLIARDA
DELLA GIOVENTV' BRESCIANA
MAESTRO ITALIANISSIMO
V MAGGIO MCMXXI¹²⁵

Director of the Tartaglia Technical Institute until his death in 1910, Abba had been at the same time a *soldier and poet of the Garibaldian epic*: one of the volunteers of the Thousand, he had in fact become the major figure of the memoirs of the Garibaldi enterprise with the publication of *Da Quarto al Voltorno. Noterelle d'uno dei Mille*, a must in school libraries; the *Storia dei Mille narrata ai giovinetti* and other works also contributed to the construction

¹²⁴ Targhetta, *Un paese da scoprire, una terra da amare*, cit., p. 31 [the text in square brackets is mine].

¹²⁵ Giuseppe Cesare Abba / soldier and poet / of the garibaldian epic / for more than five years / a most italian teacher / in this institute / he yoked his free soul / to the vigorous burning soul / of the youth of Brescia / V may MCMXXI.

of the myth of Garibaldi¹²⁶. In period after WWI, when the plaque was placed on the wall, the work of justifying the absurdity of the war led to mentioning this patriot as the source of that Garibaldi flame that had excited the *vigorous burning soul of Brescia youth* towards the national war of liberation from the foreigner. Given these ideological assumptions, the use of the superlative «italianissimo» is not striking: the posthumous example of Abba's militant italianness is taken as the glue of national solidarity in the face of the lacerations of the Great War.

On closer inspection, the social environment that raises the demand for public honours pursues, beyond the magnification of the deceased, the sublimation of the image of itself: the memory of the dead, we could say, is a monument dedicated to collective identity of the living. Figures involved in education are remembered not as individuals, but as representatives of a plurality of social groupings: public commemorative practices are imbued with the identity aspirations of the social circles of which the deceased was a member or of which s/he is elevated as an emblem (from the educational institution where s/he worked to the teaching class¹²⁷, from his or her birthplace or place of activity to the nation). A careful analysis shows that public commemorative practices have the effect of identity self-promotion: according to a sort of appropriation mechanism, the praise to the champions of education is reflected on the groups they belong to, with an outcome of self-conception and presentation to the outside as holders of similar valuable qualities; the return is in terms of heightened sense of self-worth. Therefore, the function of the rites of public commemoration is both celebratory and self-laudatory, as well as pedagogical, due to the exemplary role played by the dedicatees. If the investigation on public mnemonic materials stops at the most superficial evidence, the epigraphic and plastic artefacts are limited to saying something about the commemorated personages. Instead, with an inversion of the point of observation, the monumental sources are to be interrogated in depth to bring out, given the need for identification in the honoured figures, how the commemorating communities want to consider themselves and be considered. Public commemoration, Armando Petrucci states¹²⁸, «is, in the vast majority of cases, a practice of the living addressed to other living ones; and it is a substantially “political” practice» aimed at honouring the social presence of the community – educational, professional teaching, local and national – which is associated to the deceased and at validating its «prestige, duration over time, vital force, capacity of reproduction and development»¹²⁹. I cite two

¹²⁶ Reference to the DBE for Abba has already been made.

¹²⁷ Regarding the self-affirmation of the value of teaching professionalism starting from public commemorative events, see J. Landahl, A. Ullman, *The politics of immortality: the funeral of an education minister and teacher unionist*, in Meda, Pomante, Brunelli, *Memories and Public Celebrations of Education in Contemporary Times*, cit., pp. 261-278.

¹²⁸ Armando Petrucci, although a palaeographer, also dealt with monumental writing.

¹²⁹ A. Petrucci, *Le scritture ultime. Ideologia della morte e strategie dello scrivere nella*

examples from Mantua, which, united in the dedication to Vittorino da Feltre, are both located in the small square in front of the church that houses the remains, now lost, of the pedagogue. Evidence of the exceptional character of Rambaldoni's mnesic fortune, the memorial tablets – placed almost a century away from each other – face each other in the churchyard of S. Spirito, as if to suggest a comparative reading. The first artefact, inaugurated on 2 February 1881, was wanted – we learn from the «Gazzetta Ufficiale» – by «the public and private teachers» of Mantua¹³⁰; the text of the inscription does not contain denominational references (18).

(18)

A
VITTORINO DA FELTRE
INSIGNE MAESTRO
QUI SEPOLTO NEL 1446
GLI INSEGNANTI DI MANTOVA
MEMORI E REVERENTI
POSERO
MDCCCLXXXI¹³¹

From a photographic document saved in the Historical Archives of the Municipality of Mantua we know that on 11 November 1979, on the occasion of the conference *Vittorino da Feltre e la sua scuola: umanesimo, pedagogia, arti*¹³², Gianni Usvardi, socialist mayor of the Lombard city, stood in front of the late nineteenth-century plaque to pay homage to the highest expression of the Italian Renaissance educational art¹³³. And in 1979, the l'Associazione Italiana Maestri Cattolici (AIMC), as part of the celebrations for the sixth centenary of the birth of the so-called *Christian Socrates*, commissioned the second plaque (19).

tradizione occidentale, Torino, Einaudi, 1995, p. XIX.

¹³⁰ *Una lapide a Vittorino da Feltre*, «Gazzetta Ufficiale del Regno d'Italia», n. 32, 9 February 1881, p. 545.

¹³¹ To / Vittorino Da Feltre / illustrious pedagogue / here buried in 1446 / the teachers of Mantua / reverently and in memoriam / placed (this plaque) / MDCCCLXXXI.

¹³² The conference was held from 9 to 11 November 1979, in Venice, Feltre and Mantua. N. Giannetto (ed.), *Vittorino da Feltre e la sua scuola: umanesimo, pedagogia, arti*. Atti del Convegno di studi promosso dalla Fondazione Giorgio Cini, dai Comuni di Feltre e Mantova e dall'Accademia Virgiliana di Mantova, Venezia – Feltre – Mantova, 9-11 novembre 1979, Firenze, Leo S. Olschki, 1981.

¹³³ The photo, taken by Romano Bottardi, bears the caption *Conference in memory of Vittorino da Feltre / 11 November 1979* on the back. The photographic document – directly consultable in the Historical Archive of the Municipality of Mantua, *Photographic collection*, folder 8, fasc. 2/3 photo 1 – is also available online: <<http://www.lombardiabeniculturali.it/fotografie/schede/IMM-2s020-0002911/>> (last access: 20.07.2020).

(19)

L'ASSOCIAZIONE ITALIANA MAESTRI CATTOLICI
 RICORDA
 NEL VI° CENTENARIO DELLA NASCITA
 VITTORINO RAMBALDONI
 DA FELTRE
 PER
 LA SUA FEDE NELL'UOMO E NELL'EDUCAZIONE
 DICEMBRE 1979¹³⁴

The initiative of the AIMC seems to underlie the will to affirm the Christian spirit that permeates the educational ideal of the fifteenth-century humanist. In any case, for both Mantuan examples, regardless of how large the teaching body that recognizes itself in the Feltre personage is, the identity implications of public commemorative practises are internal and external: *ad intra*, Rambaldoni's commemoration is a factor of group cohesion as it strengthens the sense of belonging to the teaching class; *ad extra*, the marble consecration of the ideal bond with Vittorino da Feltre expresses the desire to present this *illustrious pedagogue* as the guarantor of the social credit to be paid to teaching profession¹³⁵.

All the monumental vestiges, not only the two memorial tablets of Vittorino da Feltre, confirm the thesis of which Halbwachs was a supporter: «Le passé, en réalité, ne réparait pas tel quel, [...] tout semble indiquer qu'il ne se conserve pas, mais qu'on le reconstruit en partant du présent»¹³⁶; when the French sociologist asserted that memory is established within social frameworks, he meant that the recomposition of an image of the past responds to the present needs of collective formations.

¹³⁴ Italian catholic elementary school teachers association / remembers / on the VI centenary of his birth / Vittorino Rambaldoni / from Feltre / for / his faith in man and in education / december 1979.

¹³⁵ By definition, the monumental narrative of school past is an expression of power (the way the school is represented by the ruling classes). However, when the commemorative initiative is promoted *from within*, in the sense that the funeral homage is rendered by a group of teachers, the monumental recognition takes on the connotations of collective memory of the teaching staff (the way the school represents itself) and is therefore comparable to obituaries in educational journals. Even so, we reiterate that, even if it is not of direct political origin, monumental celebration of a deceased person could not exist without the *consent*, by conviction or toleration, of the public authorities. Regarding the phenomenon of obituary commemoration see A. Ascenzi, R. Sani, *Oscuri martiri, eroi del dovere. Memoria e celebrazione del maestro elementare attraverso i necrologi pubblicati sull'erivist edidattiche e magistrali nel primo secolo dell'Italia unita (1861-1961)*, Milan, FrancoAngeli, 2016.

¹³⁶ M. Halbwachs, *Les cadres sociaux de la mémoire*, Paris, Mouton, 1975

Conclusions

This study analyses, chronologically from Unification onwards, a certain type of manifestations of public memory that were designed to function as cultural devices for the formation of the collective imaginary: that is, the epigraphic and plastic artefacts whereby the school past has been told. An in-depth examination of morphological features (material, verbal and iconic) of the monumental sources has been offered based on a series of samples selected from a wider repertoire. Particular attention has been paid to grasping the political rationale underlying the choice of gratifying through marble or bronze the educational figures considered worthy of praise, be they teachers or directors, as well as education ministers or educationalists. What emerged, throughout the transitions of power from the second half of the nineteenth century, is that these historical material sources contain an as yet unrealised heuristic potential: first, the character of monumental phenomenology has been revealed as a self-celebratory strategy implemented by elites, which, in presenting themselves as the guardians of an honourable school past, aim to self-magnify; second, the public use of school memory was functional to the consolidation of the sense of belonging to a certain community, be it educational, teaching profession, local or national; finally, the monumental traces in the anthropic space have been conceived as elements of a formation programme aimed at imbuing the collective mentality with the virtuous paradigm of the educator and more generally of the citizen.

As D'Ascenzo states,

in Italy there are very few historical-educational studies concerning the specific aspect of *nation building* through the public ceremonies held in memory of deceased school personalities, memorials or recognitions of merit-worthy teachers, [...] in terms of authentic pedagogy of citizenship¹³⁷.

What I have called the *monumental archaeology of the school imaginary* is intended to be an experimental approach to the cultural history of education because it penetrates into the official idea of education of which the plaques and statues are the mnemonic traces. Given that the adoption of the monumental perspective in the observation of the official representation of the school involves the thematization of hitherto neglected *realities* on the basis of unexplored sources, the further advance of the research front this study has opened as to the epigraphic and plastic heritage can contribute significantly to the enrichment of historical science.

¹³⁷ D'Ascenzo, *Creating Places of Public Memory through Naming of School Buildings*, cit., p. 443 [italics in text].

La representación de la infancia en los manuales escolares españoles del siglo XX: un estudio de la «bowdlerización» pedagógica de *Platero y yo* *

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The Childhood Representation in Spanish School Manuals of the 20th Century: A study of the Pedagogical Bowdlerization of Platero y yo

ABSTRACT: This article describes and analyzes the image of childhood portrayed in a classic of Spanish literature, *Platero y yo*, and its pedagogical translation in school books. In its journey from literary work to school book, a metamorphosis of the text takes place with respect to form and meaning, which methodologically speaking entails various strategies with very evident educational purposes. These procedures, without a doubt, have repercussions for the sentimental and literary education and for the reading training of the students who constitute the largest reading group that exists in any society with a universal educational system. After establishing the theoretical and historical foundation of this research, its results are presented in some detail. By means of this analysis, a great contrast

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is demonstrated between the complex and rich vision of childhood presented in the original work and that which, after suffering a process of bowdlerization, appears idealized and simplified in the reading, language and literary manuals of Spanish schools throughout the 20th century.

EET/TEE KEYWORDS: Childhood; Children's literature; Bowdlerization; School Books; Social.

Introducción

Al menos en parte, este trabajo continúa o, si se quiere, desarrolla y complementa otros textos previos¹ que centran su atención en uno de los libros más conocidos, más traducidos y más reeditados de la literatura en lengua española: *Platero y yo*, del poeta Juan Ramón Jiménez, premiado con el Nobel en 1956. *Platero* es una obra ya centenaria (se publicó en 1914)² a la que le cuadra holgadamente la condición de clásica, o sea, actual y eterna, dicho sea con palabras del propio poeta, quien además escribió: «Un clásico es todo aquello que, habiendo sido – o, mejor, por haber sido – exacto en su tiempo, trasciende y perdura»³. Aunque Juan Ramón Jiménez hablaba en general, bien podría haberle aplicado esta definición a su *Platero*, pues a poco de nacer recibió una excelente acogida y su fama no dejaría de acrecentarse con el paso del tiempo. Sin embargo, desde el comienzo mismo de ese recorrido, *Platero* dejó de ser la obra que había imaginado su autor, una elegía exquisitamente lírica, que, unida a otras más, compondría un volumen mayor⁴, alimentado

en la convocatoria 2018 de Proyectos I+D+i, Retos Investigación. Queremos expresar nuestro agradecimiento a la AEI, e igualmente a la Fundación Zenobia y Juan Ramón Jiménez de Moguer (Huelva, España) y al Centro Internacional de la Cultura Escolar (CEINCE), de Berlanga de Duero (Soria, España), y en particular a sus respectivos directores, D. Antonio Ramírez Almanza y D. Agustín Escolano Benito.

¹ J.C. González-Faraco, H.M. Pérez-Moreno, J.R. Jiménez-Vicioso, *Platero y yo, ¿libro para la infancia y las escuelas? Un estudio histórico-cultural sobre la representación pedagógica de la obra literaria*, «History of Education & Children's Literature», vol. 13, n. 2, 2018, pp. 199-217; J.C. González-Faraco, H.M. Pérez-Moreno, A. Ramírez Almanza, *Lecturas escolares de Platero y yo en la historia de la educación española (1930-1970)*, «Ocnos. Revista de estudios sobre lectura», vol. 16, n. 2, 2017, pp. 75-84; J.C. González-Faraco, J.R. Jiménez-Vicioso, H.M. Pérez-Moreno, *Asnografía: Juan Ramón Jiménez en la cultura escolar española*, Huelva, Servicio de Publicaciones de la Universidad de Huelva, 2018.

² J.R. Jiménez, *Platero y yo*, Madrid, La Lectura, 1914. Esta es la primera edición de la obra, con sólo 63 capítulos ilustrados. Para este artículo nos hemos valido de una de las muchas reediciones de la versión completa, publicada en 1917, con 138 capítulos. En concreto, la edición conmemorativa del centenario (Facediciones, Sevilla, 2014), bajo la coordinación de la Fundación Zenobia y Juan Ramón Jiménez.

³ Cit. in A. Crespo, *Juan Ramón Jiménez y la pintura*, Salamanca, Ediciones Universidad de Salamanca, 1999, p. 156.

⁴ Estas otras elegías andaluzas (*Josefito Figuraciones; Entes y sombras de mi infancia; Piedras,*

con recuerdos de infancia en su pueblo natal. Nada más ver la luz, *Platero* se convirtió en un libro para niños y para las escuelas⁵, hasta llegar a ser un clásico de la literatura infantil y una de las obras poéticas más escolarizadas de todos los tiempos. De cómo se produjo esta inesperada metamorfosis se ha escrito mucho, en igual medida que se ha especulado sobre las secuelas que ha acarreado no tanto para el libro en sí, como para sus lecturas y sus lectores. En dos artículos recientes⁶ pusimos el foco, precisamente, en algunos de los efectos de su intensa y prolongada escolarización, en el marco de una discusión teórico-histórica sobre las relaciones entre la literatura y la pedagogía. O dicho de otro modo, sobre las repercusiones de la traducción pedagógica de una obra de arte.

Platero y yo ha sido objeto de innumerables adaptaciones destinadas al público infantil y juvenil⁷. En cierto modo, su primera edición ya fue una adaptación precoz, mediante una selección de capítulos confeccionada por el propio escritor para una colección dirigida a niños y adolescentes. Pero nuestro objetivo no es indagar en este tipo de transformación que con harta frecuencia se ha aplicado a obras clásicas⁸, sino en la que acontece cuando los textos de estas obras entran, habitualmente de modo fragmentario, a formar parte de un manual escolar para cumplir una tarea educativa. Este artículo pretende profundizar en este tipo de proceso, pero fijando su atención en una categoría cultural clave para la educación, la infancia. No se trata de una elección casual. La infancia (como hecho y como símbolo o representación) es lo que da sentido a la escolaridad, y desde luego a la literatura infantil, en la que los niños suelen ser los protagonistas de las historias (que, como en la escuela, suelen inventar y contar los adultos) y sus lectores preferenciales (al igual que en la escuela)⁹. A lo

flores y bestias de Moguer) corresponden a la misma época en la que Juan Ramón Jiménez escribió *Platero* y forman parte, con él, de un mismo proyecto literario. De hecho, estamos ampliando el presente estudio sobre la infancia con la incorporación de esas otras obras.

⁵ El libro se publicó a finales de 1914 en dos ediciones simultáneas y distintas de la editorial La lectura: una, de mayor calidad, en la colección Biblioteca de Juventud; y otra, de calidad menor pero con más tirada, bajo el apelativo «El libro escolar», de la que el editor no informó al autor. En ambas, el texto estaba precedido por un brevísimo y elocuente prólogo titulado «Advertencia a los hombres que lean este libro para niños». En él queda de manifiesto que, aunque no había sido escrito expresamente para niños, esta su primera edición iba dirigida a ese público.

⁶ González-Faraco, Pérez-Moreno, Jiménez-Vicioso, *Platero y yo, ¿libro para la infancia y las escuelas?*, cit.; González-Faraco, Pérez-Moreno, Ramírez Almanza, *Lecturas escolares de Platero y yo en la historia de la educación española (1930-1970)*, cit.

⁷ A.M. Navarrete Curbelo, *Platero y yo: un siglo de adaptaciones para niños*, in S. González Ródenas, E. Navarro (edd.), *Cien años de Platero y yo (1914-2014)*, Huelva, Universidad de Huelva, 2017, pp. 43-64.

⁸ M.V. Sotomayor Sáez, *Literatura, sociedad, educación: las adaptaciones literarias*, «Revista de Educación», n. extra, Sociedad lectora y educación, 2005, pp. 217-238; J.C. González-Faraco, *Il cavaliere errante. La poetica educativa di don Chisciotte*, Milano, FrancoAngeli, 2008; L. Rodríguez-Chaparro, *Las adaptaciones de clásicos de la Literatura Universal para Educación Primaria: análisis cualitativo*, «Fuentes», vol. 19, n. 1, pp. 85-101.

⁹ A. López-Valero, E. Encabo-Fernández, *La literatura infantil como instrumento para la acción educativa y cultural: reflexiones sobre su imposibilidad basadas en la sombra del adulto*,

largo de nuestro argumento vamos a transitar un camino narrativo que toma, como punto de salida, el escenario histórico de la vida infantil en Moguer, un pueblo andaluz (en el suroeste de España), a finales del siglo XIX y comienzos del XX. Este camino se adentra, después, en la niñez que vive en su recuerdo u observa y recrea Juan Ramón Jiménez en *Platero y yo*, con un peculiar y soberbio estilo que podríamos llamar, si se nos permite, «etnopoético». Los niños (el propio poeta cuando lo era) pueblan las páginas de este bello libro. Para terminar nuestro viaje nos plantamos frente al espejo escolar de la obra, y tratamos de dilucidar qué niños, qué infancia es la que finalmente se ha filtrado hasta las páginas de los libros de texto, y nos preguntamos cómo, por qué y para qué.

En suma, la intención de este artículo es explorar el espacio liminar que media entre la realidad (tejida de hechos, recuerdos, imágenes y significados) y la obra creativa, y, sobre todo, el tránsito entre ésta y su representación pedagógica. Estamos convencidos que en cada uno de estos dos rituales de paso se opera una metamorfosis de forma y sentido, que se vale, metodológicamente hablando, de estrategias y procedimientos diversos a los que, en conjunto, podríamos calificar de «bowdlerización»¹⁰. Sin duda, este proceso obedece, en cada caso, a unas determinadas motivaciones (las más de las veces implícitas), y comporta consecuencias en la educación sentimental y literaria y en la formación lectora de los alumnos, que son, seguramente, el grupo lector más cuantioso que existe en cualquier sociedad con un sistema educativo universal.

Desvelar las claves de este palimpsesto de sucesivas reescrituras y relecturas de un clásico como *Platero*, llegando hasta su «versión» puramente pedagógico-escolar, específicamente en torno a su figuración de la infancia, y calibrar sus efectos, supone una cierta novedad en la literatura histórico-educativa y, desde luego, en el campo filológico-literario. Tras una incursión en el marco teórico en el que se apoya nuestro estudio, se muestran sus resultados más sobresalientes, para finalmente desembocar en una discusión, en la que quede de manifiesto el gran contraste entre la visión (compleja, polícroma y rica en matices) de la infancia en la obra y la que (convenientemente *bowdlerizada*) se trasluce diversamente en los manuales de lectura, lengua y literatura de las escuelas españolas a lo largo del siglo XX.

«Educación XX1», vol. 16, n. 2, 2013, pp. 247-264.

¹⁰ M. Kansu-Yetkiner, *Banned, Bagged, Bowdlerized: A Diachronic Analysis of Censorship Practices in Children's Literature of Turkey*, «History of Education & Children's Literature», vol. 11, n. 2, 2016, pp. 101-120.

1. *La infancia y su «bowdlerización» educativa en la literatura para niños*

Que la «niñez» no es lo mismo que la «infancia» es cosa sabida. La diferencia radica en que la primera, que tiene un sentido más existencial, alude a los niños y a las niñas, mientras que la segunda, a la imagen que de ellos se hacen, fundamentalmente, los adultos desde una u otra óptica, con uno u otro énfasis, a través de un código expresivo u otro¹¹. De manera tal que, como afirma Dávila¹² al reflexionar comparadamente sobre la historia de la infancia y la historia de la educación, más que una «historia de los niños y niñas, lo que se ha producido con mayor frecuencia es una historia de la representación social que tenemos los adultos sobre la infancia», lo que, sin duda, condiciona nuestro conocimiento de ella. Philippe Ariès¹³, pionero en este ámbito de investigación, puso el acento en el papel principal que la educación ha tenido en esta fabricación histórica. A su juicio, «la sensibilidad hacia la infancia, sus particularidades, su importancia en el pensamiento y en los afectos de los adultos, está ligada a una teoría de la educación y al desarrollo de las estructuras educativas». Es decir, al pensamiento pedagógico y la escolarización masiva en la modernidad, como contribución capital a la constitución de los estados nacionales y a la producción de ciudadanos para un nuevo orden político y social: el que cuajó en las sociedades occidentales desde la primera mitad del siglo XIX. Como apunta Ramírez¹⁴, la construcción social de la infancia y la construcción occidental de la condición de persona y ciudadano, están íntimamente relacionadas, y es claro que este modelo ha ejercido una poderosa influencia en todo el mundo.

La idea de la infancia es, por ser cultural, profundamente histórica, y por ello su significado y valor varían de un lugar a otro y de un tiempo a otro¹⁵. Como explican Steinberg y Kincheloe¹⁶, lo que se entendía a finales del siglo XX por una «infancia occidental tradicional» era algo relativamente moderno, con no más de siglo y medio de antigüedad:

En la Edad Media, por ejemplo, los niños participaban diariamente en el mundo adulto y, como resultado, obtenían conocimiento de las destrezas profesionales y vitales. En esta época todavía no se había desarrollado el concepto de los niños como una clasificación particular de seres humanos que requieren un tratamiento especial diferente de los adultos.

¹¹ J. Sánchez Parga, *Puerilizado y adulterado: representaciones institucionales de la infancia*, «Universitas. Revista de Ciencias Sociales y Humanas», n. 13, pp. 95-130.

¹² P. Dávila Balsera, *El lugar y la representación de la infancia en la Historia de la Educación*, «Espacio, Tiempo y Educación», vol. 2, n. 1, 2015, p. 10.

¹³ Ph. Ariès, *La Infancia*, «Revista de Educación», n. 281, 1986, p. 10.

¹⁴ F.O. Ramírez, *Reconstitución de la infancia. Extensión de la condición de persona y ciudadano*, «Revista de Educación», n. 294, 1991, pp. 197-220.

¹⁵ *Ibid.*, p. 197.

¹⁶ Sh. R. Steinberg, J.L. Kincheloe, *Basta de secretos, Cultura infantil, saturación de información e infancia posmoderna*, in Id., (edd.), *Cultura infantil y multinacionales. La construcción de la identidad en la infancia*, Madrid, Morata, 2000, pp. 15-43.

Steiberg y Kincheloe¹⁷ y Giroux¹⁸ (2003), entre otros, consideran que el significado de la infancia «como etapa de inocencia» y del niño como un ser débil que debe ser protegido, tiene su origen en los inicios de la Revolución Industrial, y se acentúa y expande tras la Segunda Guerra Mundial: «A medida que el prototipo de familia moderna se desarrolla a finales del siglo XIX, la conducta apropiada de los padres hacia sus hijos se fundió en torno a las ideas de ternura y responsabilidad adulta por el bienestar de los niños»¹⁹. Esta visión de una infancia frágil y necesitada de amparo ante los perniciosos influjos del mundo adulto, tiene, entre sus fuentes originales, a la obra de Rousseau y a la de otros representantes del pensamiento ilustrado. Con el tiempo ha favorecido el desarrollo de discursos internacionales de gran influencia, como el de los derechos de la infancia²⁰, y, sin duda, ha marcado el devenir de la pedagogía científica y la renovación educativa contemporánea.

En la segunda mitad del siglo XX y, aceleradamente, en el XXI, en tiempos de modernidad tardía²¹ o modernidad líquida²², esta visión, sin haber desaparecido, ha ido cambiando. Las fronteras que separaban el mundo adulto y el mundo infantil han ido adquiriendo una progresiva permeabilidad que, de alguna forma, amenaza ese imaginario jardín de la inocencia en el que habitaba el niño. A través de redes sociales, hipertextos, juegos electrónicos u otros medios, los niños y niñas de la sociedad digital tienen acceso al mundo adulto sin que haya una forma de control parental completamente eficaz que pueda evitarlo. Se da así la paradoja (sólo aparente) de que el niño actual vive, por una parte, una crisis de soledad en su «mundo real», fruto de la nuclearización y reducción del tamaño de las familias y del modo de vida urbano, al tiempo que navega en la conectividad ilimitada, en el océano de la hipercomunicación, de su «mundo virtual», que, no obstante, favorece el aislamiento y el narcisismo²³.

Las representaciones sociales, como señala Sánchez Parga²⁴, son «modos de conocimiento» que se inscriben en modelos culturales, por lo que, en puridad sólo se puede hablar de infancia en un sentido múltiple e histórico. Este autor se vale de dos adjetivos, «pueril» y «adulterada», para calificar las nuevas

¹⁷ *Ibid.*

¹⁸ H.A. Giroux, *La inocencia robada. Juventud, multinacionales y política cultural*, Madrid, Morata, 2003.

¹⁹ Steinberg, Kincheloe, *Basta de secretos, Cultura infantil, saturación de información e infancia posmoderna*, cit., pp. 15-16.

²⁰ P. Dávila Balsera, L.M. Naya, J. Altuna, *The representation of childhood in the discourse on the rights of the child in the twentieth century*, «History of Education & Children's Literature», vol. 11, n. 1, 2016, pp. 153-172.

²¹ M.A. Pereyra, J.C. González-Faraco, J.M. Coronel (edd.), *Infancia y Escolarización en la modernidad tardía*, Madrid, Akal, 2002.

²² Z. Bauman, *Liquid Modernity*, Cambridge, Polity Press, 2000.

²³ Steinberg, Kincheloe, *Basta de secretos, Cultura infantil, saturación de información e infancia posmoderna*, cit., p. 17; B. Ch. Han, *En el enjambre*, Barcelona, Herder, 2014.

²⁴ Sánchez Parga, *Puerilizado y adulterado: representaciones institucionales de la infancia*, cit., p. 96.

representaciones institucionales de la infancia, que se superponen hoy en día a las de la familia y la escuela. Ambos adjetivos, especialmente el segundo por ser más genérico, evocan de inmediato, por pura analogía, los procedimientos utilizados para adaptar, acomodar, alterar o censurar un texto, al servicio de una causa moral, política o educativa, y de una determinada concepción de los lectores infantiles.

En este trabajo, que gira en torno a la literatura destinada a los niños, agrupamos todos esos procedimientos bajo un término que hizo fortuna y se utiliza con asiduidad, principalmente, en el ámbito de lo literario pero también en otros campos de la expresión artística, la «bowdlerización». Nosotros extenderemos su aplicabilidad a las prácticas escolares con textos que persiguen, al menos declaradamente, un fin formativo. Pero antes de analizar con cierta extensión este proceso, vale la pena preguntarse si no podría entenderse, en cierto modo, el conjunto de la llamada literatura infantil como el resultado de una gigantesca «bowdlerización». Hay, de hecho, quienes cuestionan la misma posibilidad de una literatura infantil (a su manera, Juan Ramón Jiménez lo hizo, cuando le preguntaban por *Platero*). López-Valero y Encabo-Fernández²⁵ lo hacen, expresando sus muchas dudas sobre la legitimidad de este género literario, hecho por adultos pero destinado a los niños a partir de una cierta representación de la infancia y del lector infantil, y conforme a algunos objetivos «educativos», dicho en términos generales. Para estos autores la «sombra del adulto»²⁶ es tan patente, tan decisiva en la literatura infantil, que la invalida.

De todos modos, no hace falta llegar hasta ese extremo para albergar algunas reservas sobre un género de literatura diferenciada para un grupo de edad, cuya trayectoria es relativamente reciente, y corre paralela a una cierta concepción cultural de la infancia como etapa de la vida que requiere un singular cuidado y consideración. No es de extrañar que la producción literaria clásica o la misma literatura escrita para niños hayan sido víctimas propiciatorias de distintas manipulaciones para amoldarlas a esos lectores o sencillamente censurarlas²⁷. Esta tentación, siempre presente, se ha hecho más ostensible en circunstancias dominadas por ideologías muy conservadoras o regímenes totalitarios²⁸, o en lugares y épocas de moral muy estricta, como la que, por ejemplo, le tocó vivir a Thomas Bowdler (1754-1825). Precisamente de su versión adaptada, para mujeres y niños, de la obra de Shakespeare, expurgándola de todo cuanto juzgó inapropiado según su mentalidad puritana, proviene el calificativo *bowdlerizado*, usado desde 1838 con un indisimulado sentido peyorativo y, paulatinamente,

²⁵ López-Valero, Encabo-Fernández, *La literatura infantil como instrumento para la acción educativa y cultural*, cit.

²⁶ *Ibid.*, p. 256.

²⁷ C. Sánchez Ortiz, *Prohibido leer. La censura en la literatura infantil y juvenil contemporánea*, Cuenca, Ediciones de la Universidad de Castilla-La Mancha, 2016.

²⁸ Kansu-Yetkiner, *Banned, Bagged, Bowdlerized: A Diachronic Analysis of Censorship Practices in Children's Literature of Turkey*, cit.

con una significación más abarcadora. Como sugiere M. Carranza²⁹, hablamos de «bowdlerización» cuando:

se censuran no sólo temas o contenidos tabúes, sino también formas literarias como la sátira, la parodia; los juegos de palabras, las figuras retóricas, los finales abiertos o negativos, las descripciones minuciosas y cualquier atisbo de ambigüedad, complejidad u opacidad que otorgue mayor libertad a la actividad interpretativa del lector infantil. Un cúmulo de ‘formas prohibidas’ bajo la excusa de los supuestos límites de comprensión del lector y la preservación de su salud psíquica, afectiva y moral.

En el ámbito de la literatura infantil, quizás el ejemplo de «bowdlerización» más conocido (y más debatido) sea el de los cuentos populares³⁰. Bruno Bettelheim, uno de sus mayores críticos, puso en cuestión las ventajas de estas operaciones de edulcoración de la realidad para el desarrollo armónico de la personalidad infantil. Según Bettelheim, desde un punto de vista psicoanalítico, el provecho de los cuentos tradicionales – especialmente los cuentos de hadas – radica en mostrar a los niños la existencia humana tal cual es, y no en hurtar a los niños ese conocimiento, haciéndoles creer que «los hombres son buenos por naturaleza»³¹. Suavizar en exceso las obras literarias dirigidas a la infancia las priva de los contenidos simbólicos que permiten a los niños enfrentarse con los conflictos inherentes a la vida. Como escribe Bettelheim³²,

las historias modernas que se escriben para los niños evitan, generalmente, estos problemas existenciales, aunque sean cruciales para todos nosotros. El niño necesita más que nadie que se le den sugerencias, en forma simbólica, de cómo debe tratar con dichas historias y avanzar sin peligro hacia la madurez³³.

Puede que el caso de «bowdlerización» más famoso sea el de los cuentos de los hermanos Grimm. En su propósito inicial no había la menor intención de escribir un libro para niños. En realidad, su deseo era llevar a cabo un trabajo «etnográfico», con el objetivo de rescatar y salvaguardar la tradición de los cuentos populares, como un elemento cultural, entre otros, que sirviera para identificar lo genuinamente alemán³⁴. Este proyecto estaba de algún modo

²⁹ M. Carranza, *Los clásicos infantiles, esos inadaptados de siempre. Algunas cuestiones sobre la adaptación en la literatura infantil*, «Imaginaria», n. 313, 2012, p. 15.

³⁰ R. Pérez Parejo, J. Soto Vázquez, ¿Educación frente a cultura? El problema de la adaptación de cuentos tradicionales desde la Didáctica de la Literatura, «Revista Española de Pedagogía», vol. 73, n. 262, 2015, pp. 483-498.

³¹ B. Bettelheim, *Psicoanálisis de los cuentos de hadas*, Barcelona, Grijalbo Mondadori, p. 11.

³² *Ibid.*

³³ Por supuesto, Bettelheim tiene sus detractores. No faltan quienes consideran que «sobreinterpreta» el significado de estos textos. Vid. M.M. Martínez Sariago, *Lo que los adultos encontraron en los libros para niños: (sobre)interpretación de los cuentos de hadas en la crítica contemporánea*, «Impossibilia», n. 8, 2014, p. 81.

³⁴ G. Bosch Roig, *La tradición oral y el espíritu nacional alemán. Los hermanos Grimm en busca del cuento perdido*, in P. Bastida et alii, *Pasado, presente y futuro de la cultura*

relacionado con la gran aventura filológica de reconstruir el idioma originario o *proto-indoeuropeo*. Los Grimm, además de la lengua, también querían recuperar otros elementos de la cultura *proto-indoeuropea*, valiéndose del método comparativo, entonces una primicia en las ciencias sociales.

A pesar de que habían concebido su obra como una lectura adulta, los *Cuentos de la infancia y del hogar* (1812-1815) se convirtieron muy pronto en un libro para niños, en parte a causa de su mismo título. No fue el único caso. Otros relatos de fuentes orales populares, como los cuentos de Perrault³⁵, fueron progresivamente dulcificados no sólo para proteger a los niños de su desmesurada crudeza, sino pensando también en el público burgués que leía las sucesivas ediciones de estas obras. De hecho, en no pocos casos, los cuentos populares, en su versión original, representaban una afrenta para la moral oficial³⁶. Con el tiempo, desaparecieron de ellos o quedaron veladas las conductas sexuales explícitas, o bien un personaje funesto, como la malvada madre de Hansel y Gretel, que se transfiguraba en otro más admisible: ¡quién podía asumir que una madre abandonara a sus hijos en medio de un bosque! La madre se volvería madrastra. La mayor parte de los lectores desconoce esta colosal censura de la historia porque jamás ha leído la obra original de los Grimm, en la que, además de malas madres, había incontables referencias al incesto, el canibalismo o la tortura.

Por supuesto, esta «bowdlerización» de los cuentos de los Grimm, y de otros clásicos³⁷, persistiría e incluso se acentuaría sobre todo gracias a Walt Disney y la factoría cinematográfica que él mismo fundó y que continuaría su obra. A esta derivación actualizada de la «bowdlerización» se le ha otorgado un nombre singular: *disneyzation*³⁸. Las producciones Disney, siempre fieles a los valores familiares conservadores norteamericanos y a sus estereotipos³⁹, han acompañado a varias generaciones de espectadores en los Estados Unidos y en todo el mundo⁴⁰, y, sin duda, su influencia educativa ha sido muy relevante⁴¹.

popular: espacios y contextos, Actas del IV Congreso de la SELICUP, Palma de Mallorca, 2010.

³⁵ G. Janer Manila, *Literatura oral y ecología de lo imaginario*, Madrid, Fundación Sánchez Ruipérez, 2010.

³⁶ Carranza, *Los clásicos infantiles, esos inadaptados de siempre*, cit., p. 47.

³⁷ G. Janer Manila, *Dove si narra come Pinocchio giunse in terra di Spagna e quali cose vi accadere con passar del tempo*, in M. Gómez del Manzano, G. Janer Manila, *Pinocchio in Spagna*, Scandicci (Firenze), La Nuova Italia, 1996, pp. 9-32.

³⁸ A. Bryman, *The Disneyization of society*, «The Sociological Review», vol. 47, n. 1, 1999, pp. 25-47.

³⁹ L.R. Fraustino, *Nearly Everybody Gets Twitterpated: The Disney Version of Mothering*, «Children's Literature in Education», n. 46, 2015, pp. 127-144.

⁴⁰ S. Watts, *The Magic Kingdom: Walt Disney and the American Way of Life*, Columbia, University of Missouri Press, 1997; H. Giroux, ¿Son las películas Disney buenas para sus hijos?, in Steinberg, Kincheloe (edd.), *Cultura infantil y multinacionales*, cit., pp. 65-78.

⁴¹ H. Giroux, *The Mouse That Roared: Disney and the End of Innocence*, Lanham, Rowman and Littlefield, 1999; Fraustino, *Nearly Everybody Gets Twitterpated: The Disney Version of Mothering*, cit.

Los procesos de «bowdlerización», como ya adelantamos, operan de modos diversos con variadas intensidades, dependiendo del fin que persiguen y de otros factores de carácter formal (estéticos, instrumentales, etc.). Si comparamos la trayectoria de los cuentos de los hermanos Grimm con la de *Platero y yo* hallamos algunos paralelismos. El primero es el más evidente: a pesar de que ambas obras fueron escritas para un público inespecífico, se convirtieron en libros infantiles casi inmediatamente después de ser publicadas. Pero también descubrimos divergencias notorias. La primera que salta a la vista es que *Platero* nació como obra de arte, al menos desde la óptica de su autor, mientras que el libro de los Grimm fue originalmente fruto de un proyecto temprano de la ciencia social o «folclorista». Igualmente, se podría asegurar que la trascendencia escolar de *Platero* supera a la que haya podido alcanzar la obra de los Grimm, aunque es obvio que sus historias gozan de una fama verdaderamente extraordinaria y universal. Quizás, sin embargo, la diferencia más relevante para nuestro estudio guarde relación con el tipo de «bowdlerización» que cada una de ellas ha experimentado. En el caso de los cuentos de los Grimm observamos una auténtica expurgación, que incluye cambios en los contenidos del argumento y en las características de los personajes, con una finalidad educativa y moralizante similar a la que persiguió Bowdler al manipular los textos de Shakespeare. Este tipo de «bowdlerización», que podríamos calificar de genuina, interviene, quirúrgicamente, en la narración, la enmienda, la reescribe o la reedita en otro formato (por ejemplo, cinematográfico), modificándola sustancialmente, es decir, censurándola.

En el caso de *Platero*, la «bowdlerización» se vale de otros medios y adquiere otra dimensión, aunque la finalidad pueda parecer similar: acercar la obra a una mentalidad infantil imaginada. Como en el caso de los cuentos populares clásicos, las ilustraciones juegan un papel fundamental así como las características bibliográficas de la edición de la obra. Pero a diferencia de lo que ha sucedido a los cuentos de los Grimm, las adaptaciones de *Platero* no suelen alterar el texto (aunque haya ocasiones en que sí), y por tanto no modifican la narración. Simplemente, la obra se presenta como un libro para niños, y como tal se da a leer, típicamente en un contexto escolar. En realidad, *Platero y yo* nunca ha sido censurado como tal⁴². Sin embargo, se puede hablar de «bowdlerización», pues se ha producido una interpretación, una lectura, que

⁴² Durante la Guerra Civil (1936-1939), cada bando combatiente, en el territorio que controlaba, tomó decisiones sobre qué obras eran adecuadas y, por tanto, debían mantenerse o, de lo contrario, excluirse de una determinada biblioteca. A Juan Ramón Jiménez y a su obra les afectó la política de depuración de libros que llevaron a cabo los comités creados por el nuevo régimen militar. De hecho, muchas de sus obras desaparecieron de los fondos de las bibliotecas públicas, y *Platero*, en algunos casos, llegó a ser incluido en algunas listas de libros prohibidos, aunque en general fue tolerado. Vid. M. Boza Puerta *et alii*, *El martirio de los libros: una aproximación a la destrucción bibliográfica durante la Guerra Civil*, «Boletín de la Asociación Andaluza de Bibliotecarios», vol. 22, nn. 86-87, 2007, pp. 79-96.

muda, sustantivamente, la naturaleza de la obra. Este proceso se hace mucho más patente en la traslación del libro a los manuales de enseñanza y a la vida escolar en general, como comprobaremos con más detalle en el estudio que mostramos posteriormente. En síntesis, se puede decir que el libro sufre un tipo particular de expurgación, basado en el olvido de capítulos que, según los autores, puedan por su contenido resultar inadecuados o incluso dañinos para un lector inmaduro, inocente y vulnerable. Sin embargo, esta afirmación, verídica en términos generales, debe tomarse con cautela y ser matizada, según se trate de un tipo de manual o de otro, de una etapa educativa o de otra (desde primaria a secundaria superior), o de una fase histórico-cultural u otra, dado que esta investigación se extiende desde la tercera década hasta los finales del siglo XX. Y, en ese periodo, entre otras cosas, se suceden en España varios regímenes políticos y un rosario de reformas educativas.

2. *Las dos orejas del burro: los niños en Platero y yo. Un análisis etnohistórico y literario*

Lejos de la imagen tópica de creador narcisista e inaccesible, aislado en su torre de marfil, los niños formaron parte muy apreciada de la vida de Juan Ramón Jiménez. «Nada le gustó más al poeta que conversar con los niños, estableciendo entre ellos y él una relación que asombraba a cuantos la contemplaban, y por la simpatía con que ellos correspondían espontáneamente al afecto del poeta», escribió A. Campoamor⁴³. El mismo escritor lo confesaba con orgullo en una carta⁴⁴ enviada en 1927 a una amiga: «Tengo mis mejores amigos entre los niños, y con ellos paso ratos felices e inolvidables».

Por supuesto, la infancia es, desde todos los puntos de vista, un elemento primordial de *Platero y yo*, empezando por la del propio autor, pues se trata de una obra absolutamente autobiográfica, en buena parte presumiblemente escrita en la misma casa donde pasó parte de su infancia y adolescencia. A la suya puede añadirse la infancia que, con sus atributos, personifica en cierto modo el propio burro plateado, Platero⁴⁵; asimismo la infancia como mito, edad dorada, pero sobre todo, la infancia de Moguer, el pueblo donde se desarrolla el relato, lleno de niños de una u otra condición en casas, calles, plazas y campos... Incluso se podría decir, con alguna reserva, que *Platero y yo* es una obra sobre la infancia, aunque sería un error creer que la describe o la dibuja de manera monocromática. En este apartado de nuestro texto, nos

⁴³ A. Campoamor González, *Juan Ramón Jiménez y Zenobia Camprubí. Años españoles (1881-1936)*, Sevilla, Universidad Internacional de Andalucía, 2014, p. 788.

⁴⁴ J.R. Jiménez, *Selección de cartas (1899-1958)*, Barcelona, Ediciones Picazo, 1973, p. 85.

⁴⁵ A.A. Gómez Yebra, *La figura del niño en Platero y yo*, in *Juan Ramón Jiménez. Poesía total y obra en marcha*, Barcelona, Anthropos & Universidad de Málaga, 1991, pp. 387-395.

circunscribiremos a esa infancia que Juan Ramón Jiménez muestra en su libro, encarnada en niños con nombre y vida propios.

La historia de *Platero* acontece y fue escrita en una España paupérrima de entresiglos, malherida por una decadencia que alcanzaría en 1898 su expresión más aciaga. Todo ello reflejado en un pueblo de la Baja Andalucía, en el que un 23 de diciembre de 1881 nació Jiménez. Moguer era, en ese tiempo, una ciudad con solera y prestancia en su entorno, con una burguesía agrícola próspera pero también con grandes desigualdades sociales, que se agrandarían aún mas con la crisis económica que azotó a la población y marcó su destino a comienzos del siglo XX⁴⁶. *Platero* se desarrolla en esos dos contextos, en dos tiempos de la vida del poeta: el de su niñez, de ahí que en buena medida sea un libro de recuerdos de infancia, y el de su juventud madura, cuando regresó a Moguer entre 1905 y 1911, tras sus primeros escarceos como escritor en Madrid.

La infancia, como decíamos, inunda las páginas de este libro y adopta, en muchos momentos, un papel protagonista. En 72 de los 138 capítulos del *Platero* «completo», publicado en 1917 por la Editorial Calleja, su presencia, numerosa y variopinta, es destacable⁴⁷. En muchas ocasiones se mencionan niños o niñas indeterminados, pero también personajes infantiles concretos a los que, según se sabe, Juan Ramón Jiménez conoció, trató o con los que incluso convivió, especialmente los niños y niñas de su propia familia. En suma, una miscelánea de biografías y condiciones sociales: la niña forastera, sobrina del Pájaro Verde; Carmen la tísica; Rociillo: la niña de la casa de enfrente; sus sobrinos; Francisco Ruiz, su amigo del colegio; el niño tonto; los hijos del carbonero; la hija de Darbón; Pepe Sáenz; la niña de los globos; Mari Pepa, la niña chica, su sobrina; su hermano Eustaquio; los niños de los carabineros, los niños del enterrador, etc.

Juan Ramón, que escribió en el prologuillo del libro que en él «la alegría y la pena, son gemelas, cual las orejas de *Platero*», nos muestra, también en lo tocante a la infancia, esos dos mundos disímiles, contrapuestos, como un testimonio más de una sociedad injusta y fracturada. Las menos veces el relato deambula por una vía intermedia, agridulce, de medida y equilibrio.

En efecto, la infancia como «¡isla de gracia, de frescura y dicha, edad de oro...!»⁴⁸, está ampliamente representada en el libro. Juan Ramón fue un niño, el menor de cuatro hermanos, querido y mimado, que creció en el seno de una

⁴⁶ Vid. A.A. Gómez Yebra, *Juan Ramón Jiménez y su tiempo. Introducción*, in J.R. Jiménez, *Platero y yo*, Madrid, Castalia (Didáctica), 1992, pp. 8-45; J. Blasco, *Y la carne se hizo verbo*, in *Juan Ramón Jiménez: Aquel chopo de luz*, Sevilla, Junta de Andalucía, 2008, pp. 15-236; A. Martín Infante, *Juan Ramón Jiménez y Huelva: fin de siglo*, Huelva, Diputación Provincial de Huelva, 2009; J.M. Moreno Orta, *Moguer y Juan Ramón Jiménez*, Huelva, Diputación Provincial de Huelva, 2009; Campoamor González, *Juan Ramón Jiménez y Zenobia Camprubí. Años españoles (1881-1936)*, cit.

⁴⁷ Gómez Yebra, *La figura del niño en Platero y yo*, cit., p. 393.

⁴⁸ Texto extraído del prólogo de *Platero y yo*.

familia muy acomodada⁴⁹. Tuvo una infancia feliz, de la que hay constancia en más de una decena de capítulos, que acogen sus recuerdos más gratos, de los que éste no es más que un ejemplo: «¡Cuántos sueños le ha mecido a mi infancia esa pobre pimienta que, desde mi balcón, veía yo, llena de gorrones, sobre el tejado de don José!» (*La casa de enfrente*, cap. 16). En más de la mitad de los capítulos en los que se hace presente la niñez, dominan las imágenes gozosas en un ambiente risueño y armónico. A través de ellas deja traslucir aquellas cualidades y atributos que hacen de la infancia un paraíso: la ternura, el amor, la alegría, la ensoñación, la fantasía... Ya en las primeras líneas de la obra (cap. 1), dice de Platero que «es tierno y mimoso igual que un niño, que una niña». En otro capítulo (120), *Noche pura*, describe el hermoso cielo estrellado como «un mundo de niños»: «¡Mira cuánta estrella! De tantas como son, marean. Se diría el cielo un mundo de niños, que le está rezando a la tierra un encendido rosario de amor ideal». Tras una noche inquieta por la espera, llega la mañana del día de los Reyes Magos (cap. 122), los niños se despiertan «temblosos y maravillados». Las risas y el entusiasmo llenan muchos pasajes de la vida cotidiana, pero sobre todo de acontecimientos festivos, como la Navidad, o el bullicioso ambiente que rodea una corrida de toros, el paso de la comitiva de un teatro callejero, o la celebración colorista del carnaval: «[...] los niños [...] se han disfrazado vistosamente de toreros, de payasos y de majos» (cap. 126).

Pero si algo identifica a la niñez, es el juego. En una treintena de capítulos hay escenas lúdicas como ésta, en las que los niños dan rienda suelta a su espontaneidad, ante un suceso repentino: «¡Qué alborozo en el jardín! Los niños saltaban, tocando las palmas, arrebolados y rientes como auroras» (*El canario vuela*, cap. 30). Otras veces, se trata de juegos tradicionales (*La torre*, cap. 129; *Juegos del anocheecer*, cap. 3) o bien de actividades divertidas para las que sólo se necesita imaginación: «A ver quién llega antes! [...] A la una... A las dos... A las tres! Salieron las niñas corriendo, en un alegre alboroto blanco y rosa al sol amarillo» (*La corona de perejil*, cap. 121). Tampoco faltan las travesuras o las conductas, a veces tenidas por juegos, en las que los niños pueden llegar a ser desconsiderados, inciviles o maliciosos (cap. 24, *Don José el cura*; *El loco*, cap. 7), e incluso agresivos contra personas o animales indefensos (*Pinito*, cap. 94; *El demonio*, cap. 31; *Libertad*, cap. 32; *La yegua blanca*, cap. 108); juegos más propios de los niños de las familias y barrios humildes, aunque no exclusivamente (por ejemplo, *La tortuga griega*, cap. 87).

Por otra parte, niños y niñas, en un contexto rural de la Andalucía de finales del siglo XIX y primera década del XX, aparecen muy diferenciados en cuanto a esta faceta de lo lúdico, al igual que en otros aspectos de la vida cotidiana:

⁴⁹ Vid. A. Martín Infante, *Juan Ramón Jiménez (1891-1900) Una biografía Literaria*, Huelva, Ayuntamiento de Huelva, 2007; Blasco, *Y la carne se hizo verbo*, cit.; J.C. de Lara, *Juan Ramón Jiménez, estudiante. De las migas de Moguer al Instituto de Huelva*, Moguer, Fundación Zenobia y Juan Ramón Jiménez, 2012; Campoamor González, *Juan Ramón Jiménez y Zenobia Camprubí. Años españoles (1881-1936)*, cit.

ellos, más dados al algarabía y la agitación; ellas, más a la contemplación y la calma: «Los niños jugarán y coserán las niñas en sus sillitas bajas a tu lado...» (*El moridero*, cap. 11). También la vida escolar y el niño como alumno forman parte del paisaje cotidiano de Moguer: «Han pasado las vacaciones y, con las primeras hojas amarillas, los niños han vuelto al colegio» (*Tarde de octubre*, cap. 88). Y encuentran su reflejo en unos cuantos capítulos con un aire esencialmente amable. Los días de gira campestre son una ocasión para el disfrute: «¡Mira qué contentos van todos! Los niños, como corazonazos mal vestidos, rojos y palpitantes, traspasados de la ardorosa fuerza de esta alegre y picante tarde de octubre» (*Lipiani*, cap. 98). El mismo poeta recuerda su paso por las escuelas de «miga»⁵⁰ cuando, siendo niño, se compró un sello con su nombre: «Al día siguiente, ¡con qué prisa alegre llevé al colegio todo!: libros, blusa, sombreros, botas, manos, con el letrero: Juan Ramón Jiménez / Moguer (*El sello*, cap. 60). Naturalmente, eran escuelas precarias⁵¹, con maestros escasamente formados y mal pagados, cuya «pedagogía» se basaba en repartir premios y propinar castigos (*La miga*, cap. 6), unas notas irónicas que disgustaron mucho a Luis Bello⁵², pues las interpretó, erróneamente, como un ataque a la escuela pública por quien había disfrutado de una infancia regalada y había estudiado en un colegio de los jesuitas.

Ciertamente, fue así, pero tenemos sobradas pruebas en su biografía y en sus textos de que Juan Ramón Jiménez, fue un hombre comprometido con su tiempo, sensible al sufrimiento de los demás, en particular de los más débiles y de los niños⁵³. Su idea de la infancia como una edad de oro, no le impidió ver ni contar la infamia de una niñez pobre y desvalida, como queda reiteradamente de manifiesto en *Platero* y en muchos de sus poemas, visiblemente en *Historias*⁵⁴. No hay, pues, una infancia en el libro, sino tantas como niños, como clases sociales, como mundos dispares cohabitan en el pueblo, tal como se intuye en esta escena: «Un grupo de chiquillos sin dinero, las manos en el bolsillo o a la espalda, rodean, mudos, la cajita. A poco, llega otro corriendo, con su perra en la palma de la mano. Se adelanta, pone sus ojos en la lente...» (*El tío de las vistas*, cap. 49). No todo es luz, jovialidad, alegría. La oscuridad se vuelve sórdida y causa pavor: «Los chiquillos se alejan, y en el misterio de las puertas sin luz se habla de unos hombres que sacan el unto a los niños para curar a la hija del rey, que está hética...» (*Anochece*, cap. 59).

⁵⁰ Blasco, *Y la carne se hizo verbo*, cit., pp. 19-38.

⁵¹ J.C. de Lara, *Juan Ramón Jiménez, estudiante*, cit.

⁵² L. Bello, *Viaje por las escuelas andaluzas*, Sevilla, Consejería de Educación de la Junta de Andalucía, 1998, pp. 234-242. Edición y estudio introductorio de Agustín Escolano Benito.

⁵³ Campoamor, *Juan Ramón Jiménez y Zenobia Camprubí. Años españoles (1881-1936)*, cit.; R. Fernández Berrocal, *Introducción*, in J.R. Jiménez, *Historias*, Sevilla, Fundación José Manuel Lara, 2017, pp. 42-47.

⁵⁴ Los poemas de *Historias* fueron escritos en Moguer entre 1909 y 1912, en los mismos años en que Juan Ramón Jiménez escribió gran parte de *Platero*. *Ibid.*, pp. 7-56.

En unos treinta capítulos, con tal fuerza poética que se aproxima, a veces, a un cierto expresionismo, asoma, en toda su severidad, una infancia desgraciada de niños hambrientos, menesterosos, enfermos... Y una infancia tempranamente truncada por la muerte. Es la otra oreja de Platero.

Niños callejeros que sufren abandono y descuido, y malviven hacinados en casuchas: «La chiquilla del carbonero, bonita y sucia cual una moneda, bruñidos los negros ojos y reventando sangre los labios prietos entre la tizne, está a la puerta de la choza, sentada en una teja, durmiendo al hermanito» (*La arrulladora*, cap. 44). Familias que arrastran una vida de miseria: «La chiquilla, pelos toda, pinta en la pared, con cisco, alegorías obscenas. El chiquillo se orina en su barriga como una fuente en su taza, llorando por gusto. El hombre y el mono se rascan [...]» (*Los húngaros*, cap. 33). Niños con hambre que mendigan de puerta en puerta, y gritan: «¡Un poquiiito de paaan!...» (*El pan*, cap. 38). Niños ateridos que nunca han vivido el paraíso de la infancia: «[...] los niños del casero, que no tienen Nacimiento, se vienen alrededor de la candela, pobres y tristes, a calentarse las manos arrecidas» (*Navidad*, cap. 116). Niños sin esperanza que, sin embargo, juegan a imaginarse una vida que nunca han vivido y nunca vivirán: «[...] ¡Sí, sí! ¡Cantad, soñad, niños pobres! Pronto, al amanecer vuestra adolescencia, la primavera os asustará, como un mendigo, enmascarada de invierno» (*Juegos del anochecer*, cap. 3).

La asistencia a la escuela era, entonces, un privilegio asequible a muy pocos, y dejarla pronto, muy común, al igual que el trabajo infantil, sobre todo en los sectores sociales más desfavorecidos. Los niños debían contribuir al sustento familiar desde edades muy tempranas, como esa chiquilla «rota, sucia» que, entre sollozos, trata, inútilmente, de tirar de su flaco burrillo para que saque del lodo su vieja carretilla, cargada de hierba y naranjas (*La carretilla*, cap. 37); o esa otra que vende piñones, rendida bajo el peso de su espuerta (*Piñones*, cap. 105); o ese niño, parecido a uno de «aquellos mendiguillos que pintó Bartolomé Esteban», que pastorea en soledad un rebaño (*El pastor*, cap. 82); o aquel otro, «hombrecito enanillo y recortado», que pregona, a voz en grito, sus albérchigos (cap. 53): «De vez en cuando el chiquillo, [...] se para en seco, abre y aprieta sus desnudas piernecillas terrosas como para cogerle fuerza, en la tierra, y ahuecando la voz con la mano, canta duramente, con una voz en la que torna a ser niño en la e: ¡Albéerchigooo!...».

La enfermedad y la muerte de los niños, tan corrientes como dolorosas en los tiempos y en los lugares en los que discurre el relato, salpican las páginas de *Platero*, y muestran su mayor ferocidad cuando se suman a la pobreza. En el capítulo 46, una niña tísica («blanca la cara y mate, cual un nardo ajado...»), va a lomos de Platero («¡qué risa la de su aguda cara de muerta!»), que anda «despacio, como sabiendo que llevaba encima un frágil lirio de cristal fino. La niña, con su hábito cándido de la Virgen de Montemayor, lazado de grana, transfigurada por la fiebre y la esperanza, parecía un ángel que cruzaba el pueblo, camino del cielo del Sur». En el capítulo 17, también hondamente compasivo,

el poeta se acuerda de «uno de esos pobres niños a quienes no llega nunca el don de la palabra ni el regalo de la gracia [...]» (*El niño tonto*, cap. 17). Juan Ramón Jiménez vivió toda su vida obsesionado por la muerte, también uno de los temas centrales de su obra, pero no podía comprenderla cuando golpeaba a los niños, hasta el punto de reconocer que ese pensamiento lo había alejado de Dios. La mortalidad infantil, sin embargo, era entonces una fatalidad cotidiana. Unas veces, la muerte llegaba de la mano de la desnutrición, la falta de higiene y la pobreza; otras, de las carencias de la medicina, de un mal parto, o por un simple infortunio. En el cap. 81, el poeta se acuerda de la «la niña chica», su sobrina Mari Pepa, muerta cuando apenas empezaba a vivir: «En los largos días en que la niña navegó en su cuna alba, río abajo, hacia la muerte, nadie se acordaba de Platero. Ella, en su delirio, lo llamaba triste: ¡Plateriillo!». En el capítulo 108 (*La yegua blanca*) menciona a los dos gemelos a los que mató un rayo en la calle de las Flores; el 41 lo dedica a Darbón, el médico de Platero, quien siempre tenía su mirada fija en el cementerio («Mi niña, mi pobrecita niña...»); en el capítulo 61 (*La perra parida*), es el hijo de Salud, la lechera, quien agoniza en una choza en el campo; y en el 91 (*El cementerio viejo*) viene a su memoria su amigo de la niñez, Alfredito Ramos, a quién el mismo llevó «en su cajita blanca, de niño, una tarde de primavera». Entierros, duelos, niños muertos, pueblan las páginas de una obra que muchos han interpretado como «libro feliz»⁵⁵ indebida y abusivamente, en lo que ha influido, y no poco, su traducción pedagógica como lectura escolar.

3. Platero bowdlerizado: la representación de la infancia en los manuales escolares

No es necesario poner de relieve el gran provecho que la manualística viene prestando, como campo de estudio, a la investigación histórica de la escuela⁵⁶, y en concreto a la de la materialidad en la cultura escolar⁵⁷. Concepto éste, el de materialidad, de amplio recorrido y notable actualidad en la investigación antropológico-cultural. Los libros de enseñanza son, en efecto, un elemento clave, quizás el más representativo durante siglos, de la cultura material de la escuela, dotados de una gran densidad simbólica y semántica. En nuestro caso,

⁵⁵ Vid. 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.

⁵⁶ G. Ossenbach, *Texbook databases and their contribution to international research on the history of school*, «History of Education & Children's Literature», vol. 9, n. 1, 2014, pp. 163-174.

⁵⁷ Vid. M. Lawn, I. Grosvenor, *Materialities of schooling. Design, technology, objects and routines*, Oxford, Symposium Books, 2005; A. Escolano (ed.), *La cultura material de la escuela*, Berlanga, Ediciones CEINCE, 2007; A. Escolano, *La escuela como cultura. Experiencia, memoria y arqueología*, Campinas, Brasil, Editora Alínea, 2017.

representan un objeto preferente para el análisis etnohistórico de la enseñanza de la lectura, en el marco del giro cultural que en su momento vivieron las ciencias sociales y que ha alcanzado, con buenos frutos, a la investigación histórica de la educación a lo largo de las últimas décadas⁵⁸. Entre otras cosas, los manuales escolares, como escribe Rodríguez⁵⁹, «empezaron a ser pensados no sólo como el producto de consideraciones de tipo didácticas o disciplinarias, sino también como el resultado de la convergencia de otras lógicas como las de la política, el mercado, las empresas editoriales». Estos libros han sido sumamente útiles para analizar la genealogía y constitución de las disciplinas, en tanto que representaciones de campos del saber, o como mediadores en la construcción cultural de la ciudadanía o de la infancia, a través de textos convenientemente seleccionados⁶⁰.

Acabamos de analizar sucintamente la presencia y representación (compleja y diversa) de la infancia en *Platero y yo*, un clásico de la literatura española que no es en absoluto una obra de ficción, ni tampoco una descripción naturalista, pero sí un relato poético con grandes dosis de observación etnográfica, contada con sentido lírico, elegíaco. Es, en suma, una obra de arte, recogida, a trozos, en muchos y muy heterogéneos libros escolares, especialmente, antologías de textos y libros de lengua y literatura para la educación lectora, y la formación lingüística y literaria de alumnos de educación primaria y secundaria. A menudo, los capítulos, reproducidos total o parcialmente, van acompañados de ilustraciones alusivas y de otros elementos paratextuales, mayormente de signo didáctico. Nos vamos a limitar a aquellos a los que, a lo largo del siglo XX (y comienzos del XXI, aunque en pequeña proporción) los autores de los manuales han recurrido con más frecuencia. Para calibrarla, revisamos del orden de 3000 manuales, hasta localizar y estudiar unos 300 en los que descubrimos textos de *Platero*. Nuestro objetivo ahora, como dijimos, será examinar la presencia de niños en estos textos, es decir, determinar qué imagen de la infancia se deriva de unas preferencias reiteradas, supuestamente guiadas por fines educativos. Finalmente, en el apartado siguiente, trataremos de contrastar esta imagen o representación con la que ofrecía la obra original.

Pero antes queremos sacar a colación el concepto de transposición didáctica desarrollado, aunque ya tenía antecedentes, por Y. Chevallard⁶¹, al que

⁵⁸ V.E. Bonnell, L. Hunt (edd.), *Beyond the Cultural Turn. New Directions in the Study of Society and Culture*, Oakland, CA, University of California Press, 1999; T.S. Popkewitz, B.M. Franklin, M.A. Pereyra (edd.), *Cultural History of Education: Critical Essays on Knowledge and Schooling*, New York, RoutledgeFalmer, 2001.

⁵⁹ M. Rodríguez, *Libros de texto y sociedades: Entre didáctica, política, cultura y mercado*, «Espacio, Tiempo y Educación», vol. 2, n. 1, 2015, p. 20.

⁶⁰ A. Escolano Benito, *The identity of the schoolbook as textual genre and as mediation of cultural construction of the educated citizenship*, «History of Education & Children's Literature», vol. 10, n. 1, 2015, pp. 625-641.

⁶¹ M.A. Gómez Mendoza, *La transposición didáctica: historia de un concepto*, «Revista Latinoamericana de Estudios Educativos», n. 1, 2005, pp. 83-115; Y. Chevallard, *La transposition*

hace cumplida referencia Rodríguez⁶² al hablar de manuales, para subrayar la complejidad de la relación entre una disciplina científica y una disciplina escolar, o entre lo que Chevallard llamaría después un «saber sabio» y un «saber enseñado». Según este autor, transposición didáctica, en sentido estricto, «es la transformación de un contenido de saber preciso en una versión didáctica de ese contenido de saber»⁶³, o sea, un proceso de «didactización» que conlleva determinadas consecuencias. Aunque este concepto ha sido aplicado fundamentalmente a las ciencias y su didáctica, contiene virtualidades sugestivas para el análisis que dedicamos a la metamorfosis que supone la conversión de un texto creativo en objeto de enseñanza, aunque el texto en sí, textualmente considerado, no cambie un ápice. En todo caso, nos decantaremos por la expresión «traducción pedagógica» de una obra literaria, pues ésta no constituye un «saber sabio», aunque su traducción la convierta en un elemento propio de una disciplina escolar. Adelantamos en su momento que esta traducción podría haber causado, en el caso de *Platero y yo* y su figuración de la infancia, un efecto de adulteración que podría identificarse con un singular proceso de «bowdlerización», materializado en libros de enseñanza. Vamos a continuación a desplegar esta idea, apoyándola con datos obtenidos de manuales, publicados por un amplio elenco de editoriales⁶⁴, cuya fecha de edición oscila entre 1929 y la primera década del siglo XXI.

En conjunto, hemos hallado 51 capítulos distintos de un total de 138 (los que componen el *Platero* «completo», publicado en 1917). En una primera fase (1929-1969), que comprende el final de la Monarquía, la II República, la Guerra Civil y el Franquismo, hemos detectado 32 capítulos diferentes; en una segunda (1970-2010), que abarca el Tardofranquismo, la Transición democrática y la instauración del Sistema Constitucional actual, un total de 37. Por tanto, más de cien capítulos del libro nunca se vieron reproducidos en los libros escolares de ambos periodos. En realidad, sólo el primer capítulo sobresale por su frecuencia. En los demás, ésta es significativamente menor, así que se trata de una variedad hasta cierto punto ficticia. A pesar de ello, vamos a centrar la atención en aquellos 19 capítulos, además del primero, cuya presencia en los manuales podría considerarse suficiente. Son éstos, dispuestos ordenadamente por grado decreciente de frecuencia: *Platero* (cap. 1), *Alegría* (79), *Ángelus* (10), *La carretilla* (37), *La púa* (12), *Golondrinas* (13), *La flor del*

didactique, Grenoble, La pensée sauvage, 1980; Y. Chevalard, *La transposición didáctica. Del saber sabio al saber enseñado*, Buenos Aires, Aique Editores, 1998.

⁶² Rodríguez, *Libros de texto y sociedades: Entre didáctica, política, cultura y mercado*, cit.

⁶³ Chevalard, *La transposición didáctica. Del saber sabio al saber enseñado*, cit.

⁶⁴ Entre otras, cabe citar: Dalmau Carles Plá Editores, Espasa Calpe, I. G. Seix y Barral Hnos., Magisterio Español, Hijos de Santiago Rodríguez, Luis Vives, Escuela Española, Cerón Impresor, Ediciones Ariel, Miguel Salvatella, Hernando, Librería General, Teide, Anaya, La Espiga, Doncel, Compañía Bibliográfica Española, Altés, Paraninfo, Dirección General de Enseñanzas Medias, Prima Luce, Ediciones SM, Miñón, La Nueva Escuela, Vicens-Vives, Ministerio de Educación y Ciencia, Edelvives, Rivadeneyra, Santillana, Bruño, Cincel, Edebé, Everest, etc.

camino (50), *La primavera* (25), *La niña chica* (81), *Susto* (102), *El canario se muere* (83), *La corona de perejil* (121), *El pozo* (52), *El eco* (101), *La muerte* (132), *Juegos del anocheecer* (3), *Carnaval* (126), *A Platero en el cielo de Moguer* (136), *El invierno* (118).

Aunque en el primer capítulo, el archiconocido retrato de Platero, no aparezcan niños, no faltan referencias a la infancia encarnadas en él⁶⁵ («tierno y mimoso igual que un niño...»). Esta imagen, por encima de cualquier otra, lo va a identificar para siempre, y con él a todo el libro, pues, como sucede con otros clásicos, pocos son los que han leído *Platero y yo* en su totalidad. La mayoría lo leyó en la escuela, sin pasar en muchos casos de este capítulo que empieza así: «Platero es pequeño, peludo, suave; tan blando por fuera que se diría todo de algodón, que no lleva huesos...». El tono deleitable de este primer cuadro marcará de manera indeleble la lectura, corrientemente parcial, de la obra. En efecto, en la generalidad de los veinte capítulos analizados, los más escolarizados, el relato se mueve en ese mismo registro. Sólo en una pequeña porción de ellos, adquiere un aire elegíaco o melancólico. Quedan en el olvido todos aquellos capítulos dominados por la crítica social, la tragedia, la maldad o la injusticia, muy presentes a lo largo de la obra y, de igual modo, todos aquellos que ponen a la vista una infancia azotada por el hambre, el abandono, el dolor y la miseria.

En la mitad de los veinte capítulos más citados en los manuales escolares se detectan referencias explícitas a la niñez. En la mayoría de ellos el poeta no alude a los niños por su nombre, quizás porque los da por sabidos, pues en muchos casos se trata de sus propios sobrinos o niños de su entorno próximo. En siete de estos capítulos, cuenta escenas familiares en la casa, en el pueblo o en el campo, en las que aquellos participan alegremente, casi siempre entre risas y juegos:

Entre los niños, Platero es de juguete. ¡Con qué paciencia sufre sus locuras! ¡Cómo va despacito, deteniéndose, haciéndose el tonto, para que ellos no se caigan! ¡Cómo los asusta, iniciando, de pronto, un trote falso! ¡Claros tardes del otoño moguereno! Cuando el aire puro de octubre afila los lípidos sonidos, sube del valle un alborozo idílico de balidos, de rebuznos, de risas de niños, de ladreos y de campanillas... (*Alegría*, cap. 79). ¡A ver quién llega antes a las violetas!... A la una... A las dos... A las tres! Salieron las niñas corriendo, en un alegre alboroto blanco y rosa al sol amarillo (*La corona de perejil*, cap. 121).

El agua debe de ser tan alegre como el sol. Mira, si no, cuál corren, felices, los niños bajo ella, recios y colorados, al aire las piernas. Ve cómo los gorriones se entran todos, en bullanguero bando súbito, en la yedra, en la escuela, Platero [...] (*El invierno*, cap. 118).

En el capítulo 83 (*El canario se muere*), el poeta evoca la muerte de un canario enjaulado, al que cuidaban sus sobrinos, pero no es una muerte trágica. Se ha muerto de viejo, como un tributo a la naturaleza, a la que volverá

⁶⁵ Gómez Yebra, *La figura del niño en Platero y yo*, cit.

transfigurado en flor. La leve tristeza del comienzo se transforma, pronto, en belleza y esperanza («Platero, ¿habrá un paraíso para los pájaros?»):

Oye, a la noche, los niños, tú y yo bajaremos el pájaro muerto al jardín. La luna está ahora llena, y a su pálida plata, el pobre cantor, en la mano cándida de Blanca, parecerá el pétalo mustio de un lirio amarillento Y lo enterraremos en la tierra del rosal grande. A la primavera, Platero, hemos de ver al pájaro salir del corazón de una rosa blanca.

También en capítulo 81 (*La niña chica*), citado con anterioridad, se hace presente la muerte, esta vez de una sobrina del poeta. Se trata de un capítulo elegíaco, marcado por la pesadumbre y una tristeza contenida, compensadas por el recuerdo de una vida tan corta como feliz. Es uno de esos capítulos, los menos, en que «pena» y «alegría» caminan de la mano en una especie de rara armonía: «La niña chica era la gloria de Platero. En cuanto la veía venir hacia él, entre las lilas, con su vestidillo blanco y su sombrero de arroz, llamándolo dengosa: ‘¡Platero, Plateriiiillo!’».

Esta misma tonalidad se percibe en otros dos capítulos, ya citados en el apartado precedente, que están entre los más reiterados en los manuales: *La carretilla* (cap. 37) y *Juegos del anochecer* (cap. 3). Son los únicos de este listado predilecto, en el que se hacen presentes niños ajenos a la familia de Juan Ramón: una niña pobre que se ve obligada a trabajar desde temprana edad, o un grupo de muchachos igualmente desdichados que juegan a asustarse o a presumir, aún en su mundo ingenuo, de lo que no tienen. En ambos casos, la mirada del poeta es profundamente compasiva, solidaria, generosa. Y en medio de la desolación, un signo luminoso de júbilo, una canción:

¡Qué sonreír el de la chiquilla! Fue como si el sol de la tarde, que se quebraba, al ponerse entre las nubes de agua, en amarillos cristales, le encendiese una aurora tras sus tiznadas lágrimas (cap. 37).

Entre tanta negrura, una niña forastera, que habla de otro modo, la sobrina del Pájaro Verde, con voz débil, hilo de cristal acuoso en la sombra, canta entonadamente, cual una princesa... (cap. 3).

Sin embargo, salvo estas breves digresiones en las que se adivina, sin acritud, otra infancia, los manuales escolares ofrecen a sus lectores una infancia vestida de oro, de inocencia y dicha, de tiempo mágico, tejido de ilusiones y juegos, de hogar cálido...

Era la comida de los niños. Soñaba la lámpara su rosada lumbré tibia sobre el mantel de nieve y los geranios rojos y las pintadas manzanas coloreaban de una áspera alegría fuerte aquel sencillito idilio de caras inocentes.

Las niñas comían como mujeres; los niños discutían como algunos hombres. Al fondo, dando el pecho blanco al pequeñuelo, la madre, joven, rubia y bella, los miraba sonriendo (*Susto*, cap. 102).

La infancia, en fin, se convierte en la mejor metáfora de un mundo hermoso y puro, la representación más acabada de una humanidad sin sombra de mal: «¡Mira cuánta estrella! De tantas como son, marean. Se diría el cielo un mundo de niños, que le está rezando a la tierra un encendido rosario de amor ideal» (*Noche pura*, cap. 120)

Los autores y las editoriales de los manuales escolares, al hacer sus elecciones de textos, ya sea al servicio de la lectura o como mero instrumento para enseñar gramática o literatura a sus alumnos, se atienen a motivaciones educativas, disciplinares y didácticas, y no son ajenos a ciertas imágenes y representaciones del mundo de la vida, ni al contexto histórico (económico, cultural, y político-ideológico) que los circunda. Tampoco, a las convenciones propias de la manualística, que varían de un tiempo a otro; ni a los patrones que crean algunos autores, hacen fortuna y otros tienden a imitar.

Para nuestro análisis, como ya anunciamos, nos hemos valido de unos trescientos libros escolares. El más antiguo en el que encontramos un texto extraído de *Platero* databa de 1929. Los más modernos que hemos incluido se publicaron a comienzos del siglo XXI. Al compararlos hemos observado ciertas regularidades, pero también algunas variaciones y disonancias. En otros trabajos⁶⁶ ya señalamos el punto de inflexión que supone la concesión del Premio Nobel en 1956 a Juan Ramón Jiménez, en cuanto a la valoración y difusión popular que recibe su obra en España. Lo que es muy perceptible en su presencia en los manuales escolares, que se multiplica. Toca a su fin la posguerra, la dictadura cambia de estrategia política e inicia en 1959 y años siguientes un proceso de modernización económica (conocido por el «desarrollismo»), que tendrá importantes efectos sociales, aunque no tanto políticos hasta tanto no se produzca el fin del régimen franquista, a mediados de los años setenta.

En ese largo periodo hemos observado una imagen de la infancia en los manuales que dulcifica esa etapa de la vida, concebida y celebrada como un paraíso en la tierra. Los capítulos de *Platero* más recurrentes en los libros de texto (*Alegría*, *Golondrinas*, *Ángelus*, *La carretilla*, *La flor del camino*, *Susto*, *La primavera*...), dan pábulo a una infancia optimista, ingenua, riente, que vive al margen de los dramas adultos, una infancia ideal, a la que no perturban ni la muerte, ni el sufrimiento, tan sólo a veces una leve congoja que emociona...

En la fase siguiente (desde 1970 en adelante), época de grandes reformas educativas y cambios políticos, esta imagen prevalece, pero se va enriqueciendo, ligeramente, en significado y sentimientos. Y entre los más referenciados, aparecen, aunque en plano menor, algunos capítulos (*La niña chica*, *El canario se muere*...) en los que la sombra de la muerte entra en escena, pero no así el desgarró de la injusticia social que trae hambre, trabajo y enfermedad a los niños

⁶⁶ González-Faraco, Pérez-Moreno, Jiménez-Vicioso, *Platero y yo, ¿libro para la infancia y las escuelas?*, cit.; González-Faraco, Pérez-Moreno, Ramírez Almanza, *Lecturas escolares de Platero y yo en la historia de la educación española (1930-1970)*, cit.

pobres. Nada, o casi nada, de ese otro *Platero* llegó a los libros o a las escuelas, produciéndose de ese modo una fatal «bowdlerización» que, con una misión supuestamente educativa, altera la naturaleza de la obra literaria original y la convierte en un subproducto infantilizado y, hasta cierto punto, *disneyzado*.

Consideraciones finales

Entre 1836 y 1839, Charles Dickens publicó, por entregas, una novela titulada *The Adventures of Oliver Twist*. Europa vivía una grave crisis económica que favorecía el abandono y la explotación de niños. La crónica periodística e incluso la literatura del siglo XIX dieron cuenta de ello, brindando una imagen del niño víctima inocente de un mundo adulto perverso, que atenta contra su delicada inocencia⁶⁷. Para Dickens, como explica M. Bernardi⁶⁸, la infancia era sinónima de enfermedad, hambre, malos tratos, marginalidad y muerte, en abierta oposición a la moral dominante y al modelo educativo y estético de su época, que, como hemos visto, alentaron frecuentes procesos de «bowdlerización» de obras clásicas y cuentos populares. Pronto, a fines de la centuria, se irá extendiendo una visión separada, incluso antitética, del adulto y el niño, y con ella un mito, el de la infancia como edad feliz, saludable y confiada⁶⁹.

Ambas infancias están, en cierto modo presentes en *Platero y yo*, como hemos tratado de demostrar analizando la obra en su conjunto, tal cual fue escrita y publicada en su totalidad en 1917. Sin embargo, ¿por qué ha trascendido de ella, hasta ser hegemónica, una imagen de la niñez con todas las cualidades y aditamentos del mito contemporáneo? A lo largo de este estudio, hemos observado, descrito y escrutado la metamorfosis de sentido que sufre la obra original como consecuencia de varios procesos históricos, empezando por su primera edición (1914) y su recepción inicial. De esta circunstancia parte su conversión en un libro infantil, contemplado como tal y leído como tal, preferentemente por niños y acaso por adolescentes. *Platero y yo* no ha podido librarse aún de esa impronta, de esa catalogación, que viene a ser una especie de estigma. Raro es el adulto que lo lee o relee. Todo lo más, lo rememora como una reminiscencia nostálgica de la infancia, tierna, simpática y pueril.

⁶⁷ J.C. González-Faraco, A. Gramigna, *Learning marginality: Images of the childhood of beggars and vagabonds in the literature of nineteenth-century Europe*, «History of Education Review», vol. 41, n. 1, pp. 38-51.

⁶⁸ M. Bernardi, *Children and the dark side of Charles Dickens*, «History of Education & Children's Literature», vol. 8, n. 1, 2013, pp. 445-473.

⁶⁹ T.S. Popkewitz, *Struggling for the Soul*, New York, Teachers College, Columbia University, 1998; I. Rodríguez Pascual, *Para una sociología de la infancia: aspectos teóricos y metodológicos*, Madrid, CIS, 2007.

Sin embargo, el mayor golpe a su integridad literaria y artística se lo ha propinado su intensa y próspera escolarización, al haber sido una lectura escolar omnipresente durante décadas, asociada, como es natural, a la disciplina académica, a la ejercitación didáctica, a los rituales de la cultura de la escuela. Y es en este medio donde se le ha aplicado una serie de procedimientos que, en parte, responden al concepto de transposición didáctica y, en términos más globales, al de traducción pedagógica, a partir de los cuales se ha producido una auténtica «bowdlerización» de la obra. Hemos estudiado paso a paso esta transformación a través de una amplísima muestra de manuales escolares de lectura, lengua y literatura, enfocando el análisis en la representación de la infancia, como categoría conceptual, estética y social históricamente variable.

Platero y yo contiene innumerables referencias a la infancia, con infinitud de niños de toda condición habitando sus páginas. Su hermoso lirismo no fue impedimento, sino todo lo contrario, para que la bondad y la maldad, la dicha y la aflicción, la risa y el llanto, el gozo y el espanto, en una combinatoria equilibrada en su contraste, atravesaran toda la obra, de cabo a rabo. Su traducción pedagógica ha mutilado sistemáticamente esta riqueza semántica, entreverada de hechos, sentimientos, imágenes y significados tan diversos. ¿Cómo? Reduciendo drásticamente el libro, que queda limitado a una treintena de capítulos, entre los que destaca desmedidamente el primero, cuya lectura ha sido para muchos su único contacto con la obra. El resultado es una visión exageradamente parcial de ella, a lo que se agrega, no pocas veces, su instrumentalización con fines didácticos. El *Platero* seleccionado y troceado deliberadamente para los alumnos constituye, pues, una lectura sumamente sesgada, lo que es particularmente evidente en la imagen idealizada que le confiere a la infancia, una imagen en la que no podrían verse reflejados muchos niños de entonces ni de ahora. La escuela y, especialmente, la renovación pedagógica contemporánea, se alimentan de ese mito, y lo reproducen de mil modos, como éste que hemos descrito, el de una expurgación que, de alguna manera, deforma, falsea y aniquila al libro. Lamentablemente, este género de intermediación pedagógica se decanta por una educación literaria y una formación lectora a espaldas del lector y del tiempo de la verdadera lectura, un tiempo pleno⁷⁰, intenso y significativo, libre de la medida y de la necesidad, y de la sumisión a esta o aquella competencia funcional, a la que en nuestros días aplaude tanto la pedagogía tecnológica en boga.

⁷⁰ J. García Única, *El mal de la clepsidra. Una nota extemporánea sobre la educación literaria*, «Impossibilia. Revista Internacional de Estudios Literarios», n. 17, 2019, pp. 197-218.

El viaje americano de Adolphe Ferrière de 1930: transferencias y apropiaciones en la circulación de las pedagogías renovadoras entre Europa y América Latina. Un caso para (re)pensar las relaciones centro-periferia

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Adolphe Ferrière's american travel in 1930: transfers and appropriations on circulation of renewal pedagogies between Europe and Latin America. A case for (re) thinking center-periphery relations

ABSTRACT: In 1930 Adolphe Ferrière traveled through Latin America on behalf of the New Education Fellowship to spread ideas and to gather information about Latin American education experiences. He also sought to get a position in the European pedagogical debate. Ferrière published his travel experiences in his work *La escuela activa en América Latina*. From conceptual frameworks, such as global history and cultural transference, travel experiences as sources acquire a particular significance. In those narrations, there are elements which cover a series of central topics for the pedagogical ideas history both in Europe and in Latin America, such as those ideas circulation, the pedagogues travels and the relations between center and periphery.

EET/TEE KEYWORDS: Adolphe Ferrière; New School movement; Center-periphery relations; Travels; Latin America; XXth Century.

El mundo atraviesa una época crítica. Los extremos se tocan. En tanto que la ciencia va de descubrimiento en descubrimiento, la superstición turba cada vez mayor número de espíritus. La organización social, traspasando el marco histórico de los países, se orienta hacia una Sociedad de las Naciones, preludio de una verdadera Federación de los pueblos; y simultáneamente, los nacionalismos se exacerban, la lucha de clases parece adquirir un desarrollo nuevo y se respira una atmósfera de desorden y de confusión. El mismo porvenir se muestra obscuro y contradictorio. Mientras que unos se hallan hipnotizados por la idea de una guerra próxima, más atroz que la precedente, complicada de gases asfixiantes y torturas sin nombre, otros anuncian una era nueva; sueñan con una reforma religiosa, que devuelva al mundo dolorido la paz y la serenidad.

[...] Creemos firmemente que, sea cual fuere la catástrofe que se nos anuncia, sólo una fuerza puede rechazarla y, en cierto grado, desviar el golpe: la educación de la juventud¹.

Introducción

Durante 1930, Adolphe Ferrière emprendió un viaje por diversos países latinoamericanos, con el fin de difundir el ideario pedagógico de la Escuela Nueva y de recabar información sobre las experiencias que se estaban produciendo en el continente. Ambas tareas resumen de una manera bastante precisa las intervenciones de Ferrière en el ámbito de la pedagogía renovadora: la divulgación de esas ideas y la articulación de experiencias y núcleos de pedagogos de distintos países. El viaje fue relatado por el pedagogo en una crónica que se publicó en francés (*L'Amérique Latine adopte l'école active*, del año 1931) y en castellano (*La escuela activa en América Latina*, del año 1936). Además de realizar un recorrido por distintas obras de este pedagogo, en este artículo se indaga en profundidad en esa crónica, que muestra al continente latinoamericano desde la mirada de Ferrière.

Las iniciativas enmarcadas en la corriente de la Escuela Nueva muchas veces fueron emprendimientos individuales o de grupos pequeños de carácter privado, incluso en lugares geográficamente alejados de los principales centros urbanos, orientados a un público de sectores sociales acomodados. De hecho, como afirma Pozo Andrés, «muchas de las escuelas nuevas creadas a finales del siglo XIX y en las primeras décadas del XX se mantuvieron al margen del sistema escolar nacional»². Partiendo de esto, se propone como hipótesis que, aunque no estuviera explicitada, una de las motivaciones del viaje de Ferrière era indagar en los vínculos, en los países latinoamericanos, entre la Escuela Nueva y las políticas educativas oficiales, como forma de sostener su posición en favor de la adopción de los métodos activos por parte de los sistemas de educación pública europeos.

La influencia europea en el desarrollo escolar y pedagógico en América Latina es un hecho que no puede negarse. Pero la particular coyuntura educativa latinoamericana de los primeros años del siglo XX despertó el interés de Ferrière, quien puso al continente latinoamericano como ejemplo de lo que debía hacerse en materia de educación, invirtiendo los sentidos tradicionales de circulación (de la periferia al centro).

¹ A. Ferrière, *El progreso espiritual. La educación constructiva*, Espasa Calpe/La lectura, Madrid, 1932, p. 5.

² M. del M. Pozo Andrés, *El movimiento de la Escuela Nueva y la renovación de los sistemas educativos*, en A. Tiana Ferrer, G. Ossenbach Sauter, F. Sanz Fernández (Coords.), *Historia de la educación (Edad Contemporánea) (189-210)*, Madrid, Universidad Nacional de Educación a Distancia, 2002, pp. 189-215, en partic. p. 191.

En tal sentido, el caso de este viaje reviste particular interés para ver el modo en que Ferrière recogió las experiencias educativas latinoamericanas como una vía para intervenir en los debates que se estaban produciendo en el seno del movimiento renovador europeo. En una época de crisis para el mundo occidental, la salida, para Ferrière, pasaba por extender y oficializar las metodologías pedagógicas renovadas. Si bien el viaje de Ferrière ha sido analizado anteriormente³, interesa aquí poner el foco en la significación de la especificidad latinoamericana y en la interpretación que Ferrière realizó de esa especificidad, como una forma para repensar las relaciones entre centro y periferia.

1. *La proyección internacional de Ferrière*⁴

Ferrière nació en el año 1879 en Ginebra, hijo de una familia de la alta burguesía y con profesiones relacionadas al clero y la educación, lo cual influyó en su temprano interés por las actividades educativas. Fue parte de un pequeño núcleo de educadores europeos conformado, entre otros, por los ingleses Cecil Reddie y J. H. Badley y el alemán Hermann Lietz, iniciadores de las escuelas nuevas rurales, en las que trabajó desde 1899. Sin embargo, sus condiciones de salud (con escasos veinte años padecía una importante sordera) lo obligaron a apartarse de la práctica, siendo sus últimas experiencias docentes entre 1900 y 1902, por lo que se orientó hacia la difusión de las ideas de la Escuela Activa y de la fundamentación de estas ideas en el plano teórico, realizada desde una perspectiva científica⁵.

³ En especial por Soler Mata en J. Soler Mata, *Entre Europa i Amèrica Llatina: Adolphe Ferrière i l'Escola Nova a Barcelona*, «Temps d'Educació», n. 35, 2008, pp. 229-248 y en J. Soler Mata, *La escuela activa de Adolfo Ferrière en la pedagogía española e iberoamericana*, en J.M. Hernández Díaz (coord.), *Influencias suizas en la educación española e iberoamericana*, Salamanca, Ediciones Universidad de Salamanca, 2016, pp. 69-82.

⁴ Este apartado tiene la finalidad de ubicar al desarrollo de los vínculos internacionales como una parte fundamental en la trayectoria de Ferrière. Para un estudio detallado de su biografía, remito al trabajo de D. Hameline, *Adolphe Ferrière (1879-1960)*, «Prospects: the quarterly review of comparative education», vol. 23, n. 1-2, 1993, pp. 373-401. Disponible en: <<http://www.ibe.unesco.org/sites/default/files/ferrieres.PDF>> (último acceso: 26.02.2020).

⁵ A. Ferrière, *La práctica de la escuela activa*, Madrid, Editorial Francisco Beltrán, 1928b, p. 122 publicaba: «La escuela activa acaba de salir de la crisálida en que precursores e intuitivos geniales, los J. J. Rousseau y los Pestalozzi, la habían descubierto. Hoy entra en la era de la ciencia experimental y de las primeras aplicaciones sistemáticas» En la misma línea podemos mencionar las palabras con las que relata su rol en la visita a América Latina. Se considera a sí mismo un «representante del pensamiento científico de Europa, testigo de la verdad, cierta en todas partes y siempre, verdad que conquista paso a paso a la Humanidad para bien de las futuras generaciones» en A. Ferrière, *La escuela activa en América Latina*, Madrid, Bruno del Amo, 1936, p. 27.

En efecto, es esa concepción científica la que explica las redes internacionales que tejió Ferrière desde Ginebra, convencido de que «la observación y la hipótesis exigían ser comprobadas por otros investigadores»⁶. La fundamentación científica tenía un componente indispensable en la comparación de experiencias que, en los inicios del siglo XX, ocurrían – muchas veces de forma aislada – en diversos países (Reino Unido, Francia, Alemania, Suiza).

En 1899 se creó la Oficina Internacional de las Escuelas Nuevas, tomando una sugerencia que ese mismo año le hiciera Edmond Demolins a Ferrière, cuando éste visitó su escuela en Francia. El objetivo era contar con una institución de referencia en la que pudieran realizarse intercambios, comparaciones y evaluaciones sobre las experiencias de escuela activa, y «experimentar en otras escuelas cuestiones que en algunas se habían ensayado con éxito; comparar, valiéndose de informaciones y pruebas, lo que se hacía en algunos cientos de laboratorios»⁷. Ferrière realizaba las tareas «todos los días, por sí solo, con sus escritos extendidos por el mundo entero con su vasta correspondencia, como por sus viajes, las funciones de una Oficina Internacional de Educación»⁸, mostrando ya su rol como organizador de redes.

Ferrière fue también figura destacada del Instituto J. J. Rousseau, fundado por Claparède en 1912 y luego incorporado a la Universidad de Ginebra. Este Instituto fue un verdadero centro de producción de ideas que albergó a la intelectualidad ginebrina y que recibió pedagogos desde distintos lugares del globo, entre ellos maestros y profesores latinoamericanos, por lo que fue una pieza fundamental en las redes que desarrollara Ferrière y que le facilitarían su posterior visita al continente americano. Tal como expresa Soler Mata, el caso de Chile es un ejemplo de esos vínculos⁹.

Otro hito fundamental en la proyección internacional de Ferrière y en la articulación del movimiento renovador fue en el año 1921, cuando se llevó adelante en Calais el *Primer Congreso Internacional de Educación Nueva*. Allí nació la *Liga Internacional para la Educación Nueva*, de la que Ferrière fue elegido vicepresidente y participó de la redacción de los 30 puntos fundacionales de la Escuela Nueva a nivel global. Además, en 1922 fue elegido redactor de *Pour l'Ère Nouvelle*, la versión en francés de la revista de la Liga. Como

⁶ Id., *La ley biogenética y la escuela activa*, Madrid, Publicaciones de la Revista de pedagogía, 1933, p. 26.

⁷ Id., *La ley biogenética y la escuela activa*, cit., pp. 26-27.

⁸ P. Bovet, *La obra del Instituto J. J. Rousseau. Veinte años de vida, 1912-1932*, Madrid, Espasa Calpe, 1934, p. 324.

⁹ Cfr. Soler Mata, *La escuela activa de Adolfo Ferrière en la pedagogía española e iberoamericana*, cit., p. 77. En ese país, el responsable técnico en la administración educativa era Oscar Bustos, «antiguo alumno del Instituto Rousseau» quien mantenía informado a Ferrière de las reformas educativas chilenas en el sentido de la incorporación de las pedagogías activas. Por este motivo, no fue casual el hecho de que el inicio de las conversaciones para el viaje de Ferrière comenzara en Chile.

destaca Haenggeli-Jenni¹⁰, la revista fue pensada desde sus orígenes como una herramienta para la vinculación entre los educadores de los distintos países que adherían a los principios de la Liga Internacional, complementándose con los congresos que se realizaban cada dos años, en su rol tanto de revista científica como militante¹¹.

Por último, en el año 1925 se creó la Oficina Internacional de Educación. Como afirma Hameline, «a partir de 1921, [Ferrière] participa muy activamente en la concepción y organización laboriosa y gradual de la Oficina Internacional de Educación (OIE), de la que es nombrado director adjunto en su fundación, en 1925, cargo en el que es confirmado cuando la OIE se convierte en una organización internacional, en 1929»¹².

En síntesis, Ferrière sostuvo una visión científica desde la que fundamentó el trabajo comparativo entre las diversas experiencias pedagógicas, lo que conforma un punto fundamental para comprender su despliegue internacional y la creación de las redes en las que se apoyó para realizar su viaje por América Latina.

2. La Escuela Nueva y la educación pública en América Latina

Ferrière era el principal referente de un movimiento pedagógico y como tal, su objetivo era sumar, ampliar márgenes, por lo que una distinción entre la educación pública y la privada sería para él infructuosa. Un ejemplo sobre cómo Ferrière intentaba evitar discordias, se puede ver en la revista «Pour l'Ère Nouvelle», n. 16 del año 1925, en donde reconocía que las escuelas experimentales podían ser tanto públicas como privadas. Y si bien en el ámbito privado era más fácil establecer una diferenciación entre escuelas nuevas y

¹⁰ Cfr. B. Haenggeli-Jenni, *Pour l'Ère Nouvelle: une revue-carrefour entre science et militance (1922-1940)*, Tesis Doctoral, Faculté de psychologie et des sciences de l'éducation de l'Université de Genève, Ginebra, Université de Genève, 2011. Disponible en: <<https://archive-ouverte.unige.ch/unige:18162>> (último acceso: 2.03.2020).

¹¹ Tanto la Liga como la revista fueron fundamentales en el despliegue de las redes intelectuales y el intercambio de información entre países. En los distintos países existían “representaciones locales” (compuestos por revistas pedagógicas) de la Liga, que contaban con la legitimidad del diálogo “oficial”. Por poner un ejemplo, en el caso de Argentina, la revista de pedagogía «La Obra», que se había fundado en 1921, anunciaba en 1926 su incorporación oficial a la Liga: «La Obra, que desde hace tiempo se ha incorporado al movimiento de la nueva educación mediante la difusión de sus principios y orientaciones, se adhiere ahora formalmente a la Liga Internacional para la Educación Nueva y a la Oficina Internacional de Educación» en Editorial, «La Obra», n. 115, 1926, p. 385. En el caso argentino, este grupo nucleado alrededor de *La Obra* fue el que gestionó la visita de Ferrière al país.

¹² D. Hameline, *Adolphe Ferrière (1879-1960)*, «Prospects: the quarterly review of comparative education», vol. 23, nn. 1-2, 1993, pp. 373-401, en part. p. 8. Disponible en: <<http://www.ibe.unesco.org/sites/default/files/ferrieres.PDF>> (último acceso: 26.02.2020).

escuelas tradicionales (muchas veces las escuelas públicas adoptaban uno o algunos de los criterios de la escuela activa, pero no todos), prefería evitar «una separación artificial que sólo crea celos y reclamos, dejando el ostracismo en la puerta [...] y así tendremos la posibilidad de no hablar más que de aquello que en una escuela responde a las aspiraciones de la nueva educación»¹³.

Por este motivo, no sería apropiado afirmar que la principal preocupación de Ferrière fuera la aplicación de los métodos renovados en los sistemas de instrucción pública europeos. Sin embargo, él tenía en claro que para cumplir con el objetivo del movimiento renovador de universalizar el método de la educación activa, era fundamental que los Estados implementaran reformas escolares en los sistemas públicos, necesariamente destinados a albergar a las mayores cantidades de población.

Si bien el objetivo de este trabajo no es estudiar en profundidad el tema de la educación pública y la educación privada en el pensamiento de Ferrière, sí son necesarias algunas menciones que ejemplifiquen sus posiciones y puntos de vista, como forma de sostener el argumento central de este artículo, que plantea la importancia que tenía para el suizo el proceso de oficialización de los métodos pedagógicos renovados que ocurría en algunos países de América Latina.

En el discurso inaugural del *Segundo Congreso de la Educación Nueva* en Nueva en Montreux¹⁴, Ferrière afirmaba que «[...] no creemos que el movimiento se limite a iniciativas privadas. En un número cada vez mayor, las escuelas públicas, en el impulso de las autoridades educativas esclarecidas, se han embarcado en el camino de la transformación de la escuela»¹⁵. Luego ejemplifica con los siguientes casos: la aplicación generalizada en Bélgica del Método Decroly, «que avanza triunfal hacia el caluroso apoyo de las autoridades escolares», las *Gemeinschaftsschulen* en Hamburgo, las *Bundeserziehungsanstalten* en Viena, el método Cousinet en Francia, «que gana terreno en las escuelas del Estado» y, finalmente, en Suiza, «gracias al esfuerzo de la Sociedad Pedagógica Romandía y de su presidente M. Emmanuel Duvillard y un conjunto de maestros partidarios de la Escuela activa»¹⁶.

En *La educación autónoma* admitía las desventajas de las escuelas públicas, por ser en su mayoría «externados», frente a la posibilidad que otorgaban los «internados» (privados) de instaurar experiencias de autonomía infantil. Por eso la aplicación de ese régimen de organización escolar en las escuelas oficiales

¹³ A. Ferrière, *Écoles expérimentales en Europe et en Amérique*, «Pour l'Ère Nouvelle», n. 16, 1925, pp. 6-11 (trad. propia).

¹⁴ Id., *Discours d'inauguration*, «Pour l'Ère Nouvelle», n. 8, 1923, pp. 73-79 (trad. propia).

¹⁵ *Ibid.*, p. 74.

¹⁶ *Ibid.* Si bien la enumeración de los casos en donde se aplican métodos renovados no pareciera coincidir con un gran despliegue a nivel de la educación estatal europea, sirve el ejemplo para ver cómo este tema fue una preocupación constante en él, y como instalación del tema ya desde 1923.

era «menos decisivo, y los fracasos más frecuentes». En *La escuela activa*¹⁷ destacaba que tras la Revolución de 1918 en Alemania, la renovación pudo plasmarse en leyes y reglamentos, no como en el resto de Europa occidental en donde los reformadores debían luchar contra los gobiernos. En *La libertad del niño en la escuela activa* interpela directamente «a los legisladores escolares»¹⁸ a renovar los programas escolares, y resalta el lugar que debe tener el Estado, no conduciendo a la escuela «por caminos aventurados» pero sí estimulando el progreso, como en algunos cantones de Suiza, con la aplicación del método Decroly en Bélgica y con el ejemplo de Lombardo Radice en Italia.

La segunda parte de su libro *La escuela sobre medida, a la medida del maestro* (publicado en francés en 1931), plantea la posibilidad de una «escuela pública renovada» en la que se apliquen «programas múltiples», compuestos por «programas mínimos» y «programas de desarrollo»¹⁹ en donde la renovación ingresara de manera flexible a la escuela. Para él, «según cómo los dirigentes de la instrucción pública y escuelas normales conozcan, a fondo o, por el contrario, superficialmente, las obras de psicología genética aparecidas durante los últimos años, contribuirán a orientar a la opinión pública y al legislador hacia la aceptación de la idea de los programas múltiples o se opondrán a ellos»²⁰.

En *La educación nueva en Chile (1928-1930)* decía que no viajó al país solamente a dar conferencias, sino para instruirse «en cuanto a lo que hacía un país innovador y animoso en materia de transformación de la escuela pública»²¹, luego de confesarse «maravillado» con la reforma chilena.

En el marco de su gira iberoamericana, en las conferencias que brindó en Chile, Ferrière les decía a los maestros chilenos, expresando su visión sobre la necesidad de incorporar los métodos renovadores en las escuelas públicas:

El movimiento de las escuelas nuevas particulares, a pesar de su gran importancia, empezó a disminuir antes de la guerra europea, por dificultades de todo orden: dificultades financieras; falta de un profesorado preparado y con una visión clara de las nuevas concepciones educacionales; niños difíciles que habían sido excluidos de las demás escuelas y que había que tratar especialmente; padres ricos que no comprendían la saludable simpleza del medio en que se educaba a sus hijos etc. En lugar de estas escuelas aparece, con mayor fuerza, el movimiento del profesorado primario que desea la transformación de la escuela fiscal, movimiento que en este último tiempo ha conquistado al mundo entero²².

¹⁷ Id., *La escuela activa*, Madrid, Editorial Francisco Beltrán, 1927.

¹⁸ Id., *La libertad del niño en la escuela activa*, Madrid, Editorial Francisco Beltrán, (1a. ed. fr. 1927), 1928a, p. 37.

¹⁹ Id., *La escuela sobre medida, a la medida del maestro*, Buenos Aires, Editorial Kapelusz, 1953, p. 97.

²⁰ *Ibid.*, p. 134.

²¹ Id., *La educación nueva en Chile (1928-1930)*, Madrid, Editorial Bruno del Amo, 1935, p. 9 (destacado propio).

²² Id., *Conferencias dictadas por el doctor Adolfo Ferrière al profesorado de Santiago. Publicaciones de la sección pedagógica y de perfeccionamiento del personal*, n. 25, República de

En relación a Paraguay, Ferrière ponderaba la actuación de Ramón Cardozo, Director de Primera Enseñanza, gracias a quien se destacaba el «trabajo manual» la «coeducación de sexos» y la «disminución del enciclopedismo y el verbalismo en los programas»²³. También en Uruguay «los primeros principios de la Educación Nueva tienen ganada la causa en todas partes»²⁴, mientras que «Ecuador está, en materia de educación, en el umbral de la nueva era»²⁵.

El autor catalán Soler Mata plantea que, con su viaje, Ferrière tenía como objetivos «la recuperación de la notoriedad y el prestigio internacional, la difusión de las ideas y principios de la Nueva Educación [y] la continuación de la labor de documentación [...]»²⁶. En efecto, las críticas a la posición del suizo se incrementaban desde finales de la década del 20, y cristalizaron en el Congreso de la Liga de Niza de 1932 con argumentos que cuestionaban la falta de rigurosidad científica²⁷, la orientación espiritualista sostenida por Ferrière²⁸, y que planteaban la necesidad de mayores definiciones políticas²⁹ en una Europa fuertemente polarizada.

Ferrière (persona con preocupaciones políticas además de pedagógicas) era consciente de la situación que se aproximaba en Europa, y por eso la crónica de su viaje se hilvana en un relato en donde la jerarquía corresponde a los países en los que el Estado realizó mayores esfuerzos por implementar renovaciones pedagógicas en sus sistemas educativos oficiales. Desde su espíritu liberal es probable que ya advirtiera, hacia finales de la década de 1920, los riesgos que se avecinaban con los movimientos políticos que promovían la intervención del Estado en un sentido autoritario.

Chile, Dirección de educación primaria, 1930, pp. 33-34.

²³ Id., *La escuela activa en América Latina*, cit., p. 17.

²⁴ *Ibid.*, p. 18.

²⁵ *Ibid.*, p. 28.

²⁶ Soler Mata, *La escuela activa de Adolfo Ferrière en la pedagogía española e iberoamericana*, cit., p. 74.

²⁷ Cfr. R. Buyse, *La experimentación en pedagogía*, Barcelona, Labor, 1937, pp. 35-37. Aquí es necesario alertar sobre lo que parece una contradicción con la caracterización de Ferrière realizada antes, en donde se destacó su inclinación científica. Raymond Buyse, crítico del movimiento renovador que representaba Ferrière, ubicaba al suizo como parte de la «pedagogía nueva», a la que definía como una pedagogía «vívica» más que «experimental». Buyse se ubicaba como continuador de la línea abierta por Binet y Simon, tanto en la crítica a la escuela nueva (y a sus representantes Dewey, Decroly, Claparède y Bovet), como en la propuesta de su superación por parte de la pedagogía experimental, que tendría un carácter científico superador de los otros – que aunque se pretendieran científicos – fueron caracterizados como entusiastas que obedecían más al alma y al corazón, que a la inteligencia.

²⁸ A. Tiana Ferrer, *Principios de adhesión y fines de la Liga Internacional de la Educación Nueva*, «Transatlántica de educación», n. 5, 2008, pp. 43-48. Disponible en: <<https://dialnet.unirioja.es/servlet/articulo?codigo=3036612>> (último acceso: 26.02.20).

²⁹ El mismo Buyse en *La experimentación en pedagogía*, cit., remarca esta tensión política, en este caso en la *Conferencia de psicotecnia* de Moscú en 1931, en donde los soviéticos acusaron a los occidentales de promover una ciencia subordinada al capitalismo.

Y por eso, frente a la encrucijada que oponía la falta de intervención a la intervención autoritaria, intentará encontrar, en América, algo diferente: una intervención del Estado fundamentada a partir de criterios científicos y progresistas³⁰. Si bien no hay una mención explícita de Ferrière sobre el tema, en su relato subyace tanto la cuestión comparativa (entre Europa y América) como la valoración por la adopción de los métodos renovados en los sistemas educativos oficiales. No es absurdo, entonces, plantear que la renovación de los sistemas educativos públicos europeos era un objetivo central para Ferrière. Por eso es posible considerar este aspecto como uno de los elementos que motivaron la decisión de realizar el viaje, además de los que ya se conocen (la situación de crisis que atravesaba el movimiento renovador y particularmente la figura de Ferrière como su principal referente).

Por todos estos motivos, considero que a los elementos destacados por Soler Mata debe sumarse la cuestión de la oficialización de la Educación Nueva, que es un punto que se destaca en la crónica de viaje. Cuando Ferrière describía los avances (o estancamientos) de los países en torno a la renovación de la educación, se refería especialmente a la presencia de la escuela activa a nivel oficial. Como cuando en la introducción de su crónica (tanto en la versión castellana como en la francesa) pregunta, en referencia a América Latina:

¿Es posible afirmar se sienta en todas partes este mismo afecto, tan radiante, por las jóvenes generaciones? ¿Puede aseverarse que todos los países eviten con el mismo cuidado lo que quizás perjudique a su armoniosa florecencia? ¿Hay algún pueblo en que las autoridades se preocupen tanto de que la escuela esté de conformidad con los datos más recientes de la psicología pedagógica?³¹

sis, la escuela activa y la psicología infantil como parte de las políticas educativas oficiales era la muestra de que las pedagogías renovadoras podían implementarse a escala masiva y no ser experiencias pedagógicas aisladas, en medios rurales o para la élite³². Ferrière hizo énfasis en la educación pública latinoamericana, y en especial en la experimentación en torno a la oficialización

³⁰ No olvidemos que Ferrière realiza sus consideraciones con el análisis de la década del 20. Con el inicio de los 30, América Latina en muchos casos tampoco sería ajena a las intervenciones estatales autoritarias.

³¹ A. Ferrière, *L'Amérique Latine adopte l'école active*, Neuchâtel, Delachaux y Niestlé, 1931, p. 6 y en Id., *La escuela activa en América Latina*, cit., p. 14.

³² En este punto también es importante destacar que la posición de Ferrière estaba en sintonía con la orientación de la Oficina Internacional de Educación, que hacia el año 1929 emprendía un importante cambio en sus orientaciones luego de convertirse en un organismo intergubernamental. Como afirman Hofstetter y Schneuwly en *The International Bureau of Education (1925-1968): a platform for designing a 'chart of world aspirations for education'*, «European Educational Research Journal», vol. 12, n. 2, 2013, pp. 215-230, ya desde los inicios de la O.I.E. estaba entre sus objetivos «destacar las reformas nacionales como forma de inspirar un movimiento mundial de reformas educativas», posición en la que Ferrière seguramente tuvo influencia como Director Adjunto de la oficina desde su creación en 1925.

de los nuevos métodos: si la escuela activa como método tuvo su etapa de experimentación originariamente en Europa, en iniciativas particulares, América Latina podía ser el lugar en donde la experimentación fuera en el sentido de su aplicación como política educativa oficial.

3. *La especificidad latinoamericana en la crónica de Ferrière*

El día 25 de abril de 1930 se publicaba en la revista argentina *La Obra*, una nota editorial que se titulaba «La próxima visita del profesor Ferrière». Allí se especifican los objetivos del viaje³³:

1° Obtener para el Bureau I. d' Education una documentación lo más completa que sea posible acerca de las siguientes cuestiones referidas a la educación y a la instrucción: programas, sistemas de exámenes, métodos de enseñanza y horarios en lo que tengan de distinto con los empleados en la instrucción pública en Europa [...].

2° Dar conferencias de psicología genética (energética, ley del progreso, herencia, tipos psicológicos) y de práctica de escuela activa (métodos, disciplina) dirigidos al cuerpo docente de los países que visite³⁴.

En 1929, el educador chileno Armando Hamel, fundador de la sección chilena de la Liga Internacional para la Educación Nueva, enviaba una carta a la sede central de la Liga convocando a un conferencista a disertar sobre las nuevas pedagogías. Este pedido coincidió con un interés de la Liga y de la Oficina Internacional de Educación por conocer el estado de la educación en América Latina, por lo que Ferrière decidió viajar en 1930 a Chile y planificar una gira que incluyera visitas a otros países del continente. Antes de realizar el viaje, la Oficina pidió informes a los Estados de distintos países latinoamericanos, con la finalidad de diagramar el itinerario.

Según las respuestas que manifestaron interés por la visita, los países incluidos en la gira fueron Ecuador, Perú, Chile, Argentina, Uruguay, Paraguay, y en el regreso a Europa, Portugal y España. El inicio fue en mayo en Ecuador y culminó en Paraguay a mediados de octubre. Ferrière dictó 78 conferencias, proyectó la película sobre la experiencia *Chez Nous* (hogar en Suiza para niños carenciados), entabló diálogos con autoridades políticas y educativas y recogió documentos sobre experiencias educativas renovadoras.

La experiencia fue recopilada en un trabajo que en francés se conoció como *L'Amérique latine adopte l' école active* (subtitulado *Le magnifique effort des peuples ibéro-américains en faveur de l' education nouvelle*), editado en

³³ Además, la revista daba instrucciones para organizar las visitas de Ferrière a las escuelas, según los requerimientos del pedagogo.

³⁴ Editorial, «La Obra», n. 179, 1930, p. 156.

Neuchatel (Suiza) en 1931, y en español, *La escuela activa en América Latina* (Editorial Bruno del Amo, Madrid, año 1936)³⁵. Allí Ferrière relató sus impresiones a medida que se iba desarrollando el viaje, con estilo de crónica y una organización en secciones según cada país visitado. Es importante destacar también la aparición del ya citado *La educación nueva en Chile*, libro de Ferrière publicado por la misma editorial, Bruno del Amo, un año antes (1935).

En la introducción, tanto en su versión castellana como francesa, ofrece un relato sobre «el origen y condiciones materiales» del viaje, comentando el primer contacto chileno, las reuniones con las autoridades nacionales, las actividades desarrolladas (conferencias, proyecciones), y la presencia de grupos locales afines al ideario pedagógico renovador. Al referirse a los inconvenientes (en especial por la situación de inestabilidad política³⁶ del continente) afirma que, a pesar de ello, «y gracias a la generosidad de los amigos de la Educación Nueva, pudo terminarse el viaje sin déficit»³⁷, por lo que se infiere un bajo nivel de financiamiento, dependiente en parte de los recursos con los que pudiera contar en los distintos lugares que visitaba, siendo por esto fundamentales los lazos que había tejido también en este aspecto material.

La edición en francés y la española presentan algunas diferencias. La versión en castellano posee otro índice y agregados respecto de la francesa: un proemio, distintos documentos recogidos en sus visitas, y una sección titulada *Los últimos cinco años*, en donde se actualiza información en base al intercambio epistolar que el autor mantuvo con los referentes de los distintos países, incluyendo citas de la revista «Pour l'Ère Nouvelle» y del «Boletín de la Oficina Internacional», donde se hacía referencia a la situación reciente de los países después de seis años pasados desde la primera edición en francés.

El proemio es un documento por demás interesante, que expresa la opinión de Ferrière luego de su viaje por América, donde plasma la importancia de dar a conocer las experiencias educativas del continente. Las palabras utilizadas por Ferrière ameritan la extensión de la cita:

La escena representa un gabinete de trabajo cuyas paredes están ocultas tras rimeros de libros [...].

-Sírvase tomar asiento. ¿Qué me trae usted?

-Traigo...; temo que...

- ¿Un manuscrito? ¿De qué se trata?

-De América Latina. [...]

-Bien. Supongo no me trae nada de pedagogía; ya sabe usted que eso no se lee. [...]

³⁵ Es interesante remarcar el concepto de «adopción», presente en la edición en francés pero no en la española, quizás como forma de evitar posibles connotaciones negativas por la subordinación que implica ese concepto.

³⁶ Entre otros casos, en Argentina fue testigo del golpe militar que destituyó a Hipólito Yrigoyen y la visita a Brasil tuvo que ser suspendida porque en ese país también, un mes después de Argentina, hubo un golpe militar que impidió el desembarco de Ferrière en Río de Janeiro.

³⁷ Ferrière, *La escuela activa en América Latina*, cit., p. 27.

-Durante mi viaje he podido establecer algunas comparaciones de psicología social. Es casi seguro que los lectores sientan interés en leer algo sobre el alma de los pueblos.

-Pero, ¿tienen alma los pueblos de América Latina? [...] ¿América del sur no tiene civilización!

-No se moleste, como hija de España, de Italia y de Francia, cultiva la razón latina, razón hecha de lógica, de sentido común, de armonía entre facultades humanas.

-Eso no es mucho para los tiempos que corren.

- [...] En pocas palabras, es pensamiento que se conserva libre, actividad siempre despierta, agilidad de actitud, atención respecto de la vida, ajuste continuamente renovado a situaciones siempre nuevas.

-Así aparece el genio latino.

-Así es en efecto; indudablemente, la historia ha impreso su sello sobre esos pueblos [...]. Las diversidades importadas se desvanecen con desconcertante rapidez, y, en su lugar, se diseña un tipo Latino-Americano muy marcado. Bien podría ser uno de los temas principales de mi obra el esbozo de los rasgos esenciales. – ¿Se propone usted escribir ese libro? – Sólo de usted depende [...] ³⁸.

Representación ficcional de un diálogo entre Ferrière y el editor que recibe el manuscrito del libro, muestra los argumentos presentados al editor para justificar la publicación del libro. Entre ellos, que América recibió los espíritus más innovadores con las olas migratorias. Las influencias europeas junto a la población originaria,

todo eso, mezclado, fundido, está superiormente *dispuesto* para la lucha con el fin de conseguir la supremacía de la razón y de la armonía. [...] Puede decirse que hay *una* América Latina, pudiendo añadir que en ella reside el porvenir de la humanidad. [...] Lo más acertado para evidenciarlo sería describir el esfuerzo notable hecho en varios países de América Latina en favor de la infancia, empleando los medios más adecuados, como son: psicología infantil, métodos modernos, en dos palabras, 'Escuela Activa' ³⁹.

El objetivo principal del libro ⁴⁰ era demostrar que había todo un continente avanzando hacia la modernización de la educación, y que esa modernización era por las vías de la escuela activa. Pero además, si entendemos que la edición de la obra en España era la puerta de entrada del autor en América Latina, estas

³⁸ Id., *La escuela activa en América Latina*, cit., pp. 5-12.

³⁹ *Ibid.*, p. 12. (destacado en el original)

⁴⁰ Ferrière no fue el único que para esa época viajó a países latinoamericanos y relató su situación educativa. En 1929 el «Boletín de la Unión Panamericana» sacaba un número sobre *Nuevas corrientes educativas en Iberoamérica*. Heloise Brainerd, Jefa de la Sección de Educación de la Unión Panamericana, escribía en el *Boletín*, luego de una viaje por varias repúblicas sudamericanas y por Panamá, que «el carácter de los artículos publicados en las revistas pedagógicas de las Américas del Sur y Central demuestra claramente que los educadores de esos países se están interesando en las teorías y en las prácticas modernas tanto como los de cualquier otra parte del mundo» en H. Brainerd, *Novas correntes educativas na Ibero-America*, «Boletim da União Pan-Americana», n. 27, 1929, p. 1. También, que «en México, la escuela activa fue introducida en mayor escala que en cualquier otro país de América», y que en su visita a ese país en 1926, Dewey afirmó que «no hay movimiento educativo en el mundo, que ilustre mejor el espíritu de unión íntima de las actividades escolares con las comunidades, que este movimiento mexicano.» en Brainerd, *Novas correntes educativas na Ibero-America*, cit., p. 1.

palabras adquieren un sentido que tiene que ver con reforzar y estimular las iniciativas que conoció en su viaje.

Ferrière describía esa modernización estableciendo una escala de valores según la cual los países que ocupaban los primeros lugares eran los que habían adaptado las iniciativas de la educación activa en sus sistemas educativos oficiales. Siguiendo esa escala, por ejemplo, Argentina era el país «menos afecto al ideal innovador, [...] quizá el único que nada había hecho oficialmente en favor de la Educación Nueva. En él la tradición es más “francesa” que en cualquier otro, en los medios gubernamentales; tal vez esperen que Francia se haya decidido en las actuales controversias pedagógicas»⁴¹.

Si bien esta taxativa afirmación debería ser por lo menos matizada⁴², lo interesante es la forma en que está construido el argumento: el sistema educativo argentino se configuró a partir de una fuerte influencia de la pedagogía tradicional francesa, por lo cual es reticente a incorporar las innovaciones del movimiento pedagógico. Hay un juicio de valor negativo sobre esa influencia, que produjo un sistema según el modelo napoleónico, principal causa que obstaculizaba la renovación. En otras palabras, en la escala de valores de Ferrière, el sistema educativo argentino ocupaba las posiciones más “bajas”, por ser uno de los sistemas más emparentado a un caso europeo, a diferencia de los países en los que esa influencia no habría sido tan fuerte.

En la comparación, serán Ecuador, Paraguay y Chile los que muestren mayores avances en el proceso de transformación de la educación, lo cual estaba relacionado con el nivel de adhesión a los principios pedagógicos renovadores por parte de las autoridades políticas y educativas. En el caso de Ecuador, Ferrière ponderaba fuertemente el hecho de que hubiera sido el «primer país latinoamericano» en adherir oficialmente a la Oficina Internacional de Educación⁴³, con un involucramiento directo en el asunto por parte del presidente de la Nación.

En Paraguay, en 1925 «se franqueó el límite que separa la antigua Escuela de la Escuela Nueva. Esta transformación atrevida se debe a la clarividencia y a la paciente energía de un solo hombre, [...] el Director de Primera Enseñanza [...], que adoptó por maestros a Juan Dewey, al Dr. Decroly y G. Kerschensteiner»⁴⁴.

⁴¹ Ferrière, *La escuela activa en América Latina*, cit., p. 16.

⁴² Por poner un ejemplo, en su libro *La práctica de la escuela activa*, Ferrière había sostenido que «Por lo tanto, considerada en sus líneas generales, la doctrina de la Nueva Educación parece corresponder al ideal secular de la pedagogía liberal francesa [...]. Felicitémonos que la era napoleónica del Liceo-cuartel esté declinando y que el ideal secular de la pedagogía liberal francesa» esté, como nos lo afirman, en vísperas de una resurrección, o más bien – no siendo resurrección el término adecuado, puesto que este ideal nunca ha dejado de vibrar entre los más preclaros espíritus – digamos que, en estas nuevas ideas, vemos el amanecer de la era nueva de la Escuela activa en Francia» en A. Ferrière, *La práctica de la escuela activa*, Madrid, Editorial Francisco Beltrán, (1a. ed. en fr. 1924), 1928b, p. 32.

⁴³ *Ibid.*, p. 26.

⁴⁴ *Ibid.*, p. 17.

Ferrière consideró a la experiencia chilena como la más avanzada en la adopción de las ideas de la escuela activa por parte de un sistema educativo oficial. Para él, «en Chile está implantada la Escuela Nueva con mayor solidez que en ningún país (exceptuando la ciudad de Viena hasta 1933) [...]»⁴⁵. En efecto, el país se encontraba en un proceso de reformas educativas desde el año 1926, cuando se convocó al Congreso Nacional Pedagógico, lo cual derivó en la sanción del Decreto 7500 *Sobre reforma educacional*⁴⁶, que daba marco legal a la reforma⁴⁷. En definitiva, se trataba de países que estaban en el proceso de abandonar «los errores de la antigua escuela importada de Europa y que tan mal se adapta a las necesidades requeridas por la juventud iberoamericana»⁴⁸.

Mucho se ha escrito sobre los sistemas educativos de Europa y Estados Unidos y sobre los pedagogos latinoamericanos que viajaban para conocerlos de primera mano y luego implementar los modelos en sus países. Buena parte de la pedagogía latinoamericana⁴⁹ se fundó sobre este paradigma que representan Domingo F. Sarmiento o José P. Varela, por poner dos ejemplos. Lo nuevo, las novedades pedagógicas, conquistarían los discursos educativos latinoamericanos desde mediados del siglo XIX, como piedra fundacional de un campo, y en la mayor parte de los casos contrariando tradiciones arraigadas en posiciones conservadoras ancladas principalmente en la herencia católica. Desde una mirada que reconozca posiciones de subordinación entre los países del “centro” y la “periferia”, podría decirse que los segundos no tendrían elementos para aportar a los primeros, por ser éstos más desarrollados, más experimentados. Por el contrario, desde esta perspectiva se espera que sean los segundos los que incorporen los “avances” producidos en los países centrales.

⁴⁵ *Ibid.*, p. 18.

⁴⁶ El decreto daba una responsabilidad principal al Estado como entidad responsable de la educación, jerarquizaba a la psicología del educando como criterio para establecer planes, programas y métodos en una educación primaria gratuita. En su artículo 10 propone que «Toda escuela será considerada y organizada como una comunidad orgánica de vida y de trabajo en la cual colaboren los maestros, padres y alumnos». Además, el Consejo de Educación de cada provincia tenía por atribuciones (Art. 37): «Estudiar los resultados de programas, métodos y procedimientos en práctica y las reformas e innovaciones que creyere necesario establecer», y «Autorizar a los maestros más idóneos para experimentar y poner en práctica nuevos métodos o regímenes de trabajo en sus establecimientos» en n. *Ley. Decreto. N.º 7.500 sobre reforma educacional*, Santiago de Chile, Imprenta Nacional, 1928. Disponible en <<http://www.memoriachilena.gob.cl/archivos2/pdfs/MC0057582.pdf>> (último acceso: 24.01.2020).

⁴⁷ Los ajustes y alcances de la reforma planteada en ese decreto estaban en discusión al momento de la llegada de Ferrière a Chile, cuando se imponían posiciones más moderadas, en J. Caicco Escudero, *Algunos antecedentes sobre la presencia de la Escuela Nueva en Chile durante el siglo XX*, «Anuario. Historia de la Educación», n. 6, 2005, pp. 31-49.

⁴⁸ *Ibid.*, p. 18.

⁴⁹ No toda, vale remarcar. La línea de pensamiento abierta por Simón Rodríguez, con su apotegma “inventamos o erramos”, funda toda una corriente que reclama la creación de respuestas originales para problemas que se reconocen como propios.

Pero la idea de lo nuevo⁵⁰ también puede ser interpretada de otra manera. Desde su descubrimiento/conquista, América también representó lo nuevo para Europa. Lo nuevo en el sentido opuesto a lo desgastado. América poseía el valor de enfrentar al *viejo continente* con un pasado utópico que la misma sociedad se ocupó de corromper. De alguna manera, ese pasado ideal y “cercano a la creación” se mantenía vigente en América, territorio que representaba la posibilidad de transformación de ese presente corrompido hacia un futuro utópico, construyendo en sus tierras “vírgenes” una sociedad desde los inicios, en un mundo «cargado sólo de futuro»⁵¹.

El tiempo es “lo que no pasó”, posibilitando que se mantuviera “nuevo”. Como en el mito del buen salvaje, América permaneció, desde este punto de vista, ajena a los tiempos civilizatorios que generaron la degradación de la sociedad en Europa. Entre lo viejo y lo nuevo, en definitiva, media el tiempo. Lo viejo es lo que ya pasó, lo que ya no da respuestas, pero que de alguna manera logra permanecer en el tiempo. Por eso, lo nuevo es lo que viene a reemplazarlo, como la Escuela Nueva que pugna por modificar sistemas educativos donde la vieja pedagogía continuaba su dominio. Los sistemas educativos latinoamericanos, de más reciente creación que los europeos, no cargaban con el peso de esa tradición pedagógica devenida en autoritaria, obsoleta para los ideales de transformación social que promovía el movimiento de la Escuela Nueva.

En definitiva, como parte del proceso tardío (desde la mirada europea) de sistematización de la educación, en algunos países de Latinoamérica se produjo una apropiación⁵² a nivel oficial de las propuestas pedagógicas en circulación en esos momentos, hacia finales del siglo XIX y primeras décadas del XX, ideas que circulaban como parte de un proceso de internacionalización educativa y que en gran medida se correspondían con las propuestas de la Escuela Nueva.

Del análisis de las referencias de Ferrière al continente latinoamericano se desprende que en su pensamiento subyace esta concepción de “lo nuevo”. De alguna manera, cuando Ferrière afirma «puede decirse que hay una América Latina, pudiendo añadir que en ella reside el porvenir de la humanidad»⁵³,

⁵⁰ V. Goldgel, *Cuando lo nuevo conquistó América: Prensa, moda y literatura en el siglo XIX*, Buenos Aires, Siglo XXI, 2013.

⁵¹ *Ibid.*, p. 34.

⁵² Según Olga Zuluaga apropiarse un saber significa «hacerlo entrar en las coordenadas de la práctica social. Es por tanto un proceso que pertenece al orden del saber como espacio donde el conocimiento está accionado por mecanismos de poder y no por la lógica del movimiento de los conceptos en el conocimiento científico» en R. Ríos Beltrán, *El concepto de apropiación como herramienta para el análisis histórico y cultural: notas introductorias*, en R. Ríos Beltrán, J. Sáenz Obregón (edd.), *Saberes, sujetos y métodos de enseñanza. Reflexiones sobre la apropiación de la Escuela Nueva en Colombia*, Bogotá, Universidad Nacional de Colombia, Facultad de Ciencias Humanas, Centro de Estudios Sociales (CES), Universidad de Antioquia, Facultad de Educación, 2012, pp. 191-201.

⁵³ Ferrière, *La escuela activa en América Latina*, cit., p. 12.

se ubica en una tradición⁵⁴ que concibe a América en tanto novedad como sinónimo de algo todavía no corrompido, que no carga con el lastre de años de tradiciones conservadoras, asumiendo una (si se permite el anacronismo) braudeliana concepción plural del tiempo social⁵⁵.

La crítica de Ferrière a los sistemas educativos identificados con la tradición europea, la valoración negativa de situaciones como la de Argentina, por sus grandes similitudes con los sistemas europeos, y la reivindicación de los sistemas educativos de países cuyo esfuerzo había estado en reformar esos modelos pedagógicos, no pueden pasar desapercibidas. Ferrière puso en cuestión las diferencias entre el centro y la periferia, y lo hizo a contramano de lo que supondrían las lecturas tradicionales. Esto es, reivindicando a lo periférico como lo valioso por no estar corrompido como sí lo estaba lo tradicional, en una problematización de los vínculos entre lo local (experiencias educativas innovadoras en Latinoamérica) y lo global (modelo de educación tradicional que se había expandido desde Estados Unidos y Europa al resto del mundo).

De hecho, en la posición de Ferrière se puede interpretar una ruptura con el modelo eurocéntrico cuando afirma «abrigo grandes esperanzas respecto de Chile; no me sorprenderá que un buen día aparezca, en materia de educación pública, como laboratorio ejemplar y modelo digno de las demás naciones del globo»⁵⁶.

Reflexiones finales

Cuando se reflexiona «sobre la pertinencia (o no) del paradigma de la subalternidad en la historia y la antropología latinoamericanas»⁵⁷, volver sobre un pensamiento como el de Ferrière puede agregar elementos para profundizar las discusiones sobre el lugar que ocupan las regiones “periféricas” en el flujo

⁵⁴ El análisis de las fuentes filosóficas del pensamiento de Ferrière es una tarea que excede las posibilidades de este escrito. Sin embargo, no puede dejar de mencionarse que Ferrière se situaba en la continuación de un pensamiento inaugurado por otro ginebrino, Jean Jaques Rousseau, a la sazón, uno de los inspiradores del pensamiento ilustrado y, en consecuencia, del movimiento revolucionario que estalló en Francia en 1789, siendo uno de los antecedentes de las independencias latinoamericanas. El “mito del buen salvaje”, con una presencia en los debates modernos a partir de la conquista de América, adquiere relevancia a partir de Rousseau y su *Discurso sobre el origen de la desigualdad entre los hombres*. Sin duda, algo (o mucho) del pensamiento de Ferrière es una deuda intelectual con las concepciones de Rousseau, y no solamente en materia educativa.

⁵⁵ Seguramente la crisis de la Primera Guerra influyó en que Ferrière no considerara la existencia de un tiempo único, no creyera en una confluencia unilineal de un progreso del que Europa era el ejemplo.

⁵⁶ Ferrière, *La escuela activa en América Latina*, cit., p. 18.

⁵⁷ P. Sandoval, *Presentación*, en Id. (comp.), *Repensando la subalternidad. Miradas críticas desde/sobre América Latina*, Lima, Instituto de Estudios Peruanos, 2010, pp. 7-21, en partic. p. 7.

global de ideas. Desde un punto de vista historiográfico, a partir de la renovación epistemológica comprendida por perspectivas como la de la historia global, fuentes históricas como la crónica de viaje de Ferrière adquieren relevancia, con nuevas posibilidades para pensar lo subalterno. Como afirma Sandoval,

mediante el análisis comparativo y procesual, la historia global busca desarticular los paradigmas historiográficos teleológicos de la historia universal, pone en discusión el estructuralismo implícito en los esquemas centro-periferia de la teoría de la dependencia en el contexto latinoamericano y supera la visión eurocéntrica que ha caracterizado la vieja historia universal y en general la historia económica internacional⁵⁸.

El pensamiento decolonial también presenta sus riesgos, como plantear, desde la diferencia de la periferia, a la historia europea como homogéneamente moderna⁵⁹ y sin fisuras. En este sentido, «[l]as posturas más anticolonialistas y anti-eurocéntricas corren así el peligro de esencializar la modernidad central de la que estaríamos excluidos y de perpetuar, por la vía de la denuncia, esa misma lógica eurocéntrica a partir de la cual toda resistencia se descubre condenada a definirse»⁶⁰.

El viaje de Ferrière no fue solo para difundir las pedagogías activas, para conocer experiencias innovadoras y para legitimar su posición en un movimiento pedagógico renovador que atravesaba una fuerte crisis. El objetivo era también marcar un rumbo que según su punto de vista debía seguir la educación europea tomando como ejemplo algunas situaciones particulares de Latinoamérica, mostrando justamente las fisuras.

El pedagogo marcó el interés de las autoridades de los países latinoamericanos por las nuevas teorías pedagógicas, tanto autoridades educativas, como autoridades políticas nacionales. Por ejemplo, en Ecuador, «la iniciativa en favor de la renovación escolar [...] emana del jefe de la jerarquía social: del Presidente de la República»⁶¹, el Dr. Isidro Ayora, de quien Ferrière subrayaba que fuera médico. Además del encuentro con los presidentes y los ministros de Instrucción Pública de Ecuador, Paraguay y Argentina, Ferrière se reunió también con las autoridades educativas nacionales de Perú, Chile y Uruguay.

Ferrière pregunta: «¿Hay algún pueblo⁶² en que las autoridades se preocupen tanto de que la escuela esté de conformidad con los datos más

⁵⁸ Sandoval, *Presentación*, cit., p. 12.

⁵⁹ «En realidad, describir la historia europea simplemente en términos de su “modernidad” sólo es posible al precio de excluir todos los cuestionamientos que también fueron y siguen siendo parte de ella; tal como demuestra Bruno Latour (2007), la idea de modernidad está plagada de contradicciones [...]» en Goldgel, *Cuando lo nuevo conquistó América: Prensa, moda y literatura en el siglo XIX*, cit., p. 40.

⁶⁰ *Ibid.*, 41.

⁶¹ Ferrière, *La escuela activa en América Latina*, cit., p. 15.

⁶² Aquí es necesario mencionar el siguiente hecho, citado por Soler Mata. En su viaje de regreso a Europa, Ferrière visitó Portugal y España. Luego de visitar la *Escola de Bosc del Parc del Guinardó* de Barcelona, dejó la siguiente reflexión en el libro de visitantes: «Con la excepción de

recientes de la psicología pedagógica? Sobre este punto también puede aportar mi libro testimonio convincente, aún para los más escépticos, suscitando tal vez emulación en los países del viejo continente [...]»⁶³. En este caso el mensaje no estaba destinado solamente al público hispanoparlante: la introducción consiste en una traducción literal de la versión publicada cinco años antes en francés⁶⁴. De alguna manera, hay una “inversión” del sentido de la circulación, ya no del centro a la periferia, como se esperaría desde los enfoques más tradicionales de los «modelos» o las «influencias»⁶⁵, sino desde la periferia hacia el centro.

El propio Ferrière afirma, en un artículo en *Les Nouvelles Littéraires* a propósito de su viaje por América:

¿El progreso se extiende del Este al Oeste, como afirman los amantes de lo cuantitativo? ¿O se profundizará en Oriente, como sostienen los espíritus filosóficos enamorados de lo cualitativo? Yo no lo sé. También podemos sostener que el progreso va de la periferia al centro, de los países de cultura reciente, donde el obstáculo de la tradición es ligero, a los países de antigua civilización [...]»⁶⁶.

Como se muestra en el epígrafe que da inicio a este artículo, Ferrière se situaba en una Europa en crisis, que había salido del desastre de la Primera Guerra pero pronto ingresaría en la Segunda. En definitiva, una Europa que ya no daba garantías de liderar el progreso. Por eso Ferrière podía poner en cuestión esa ley que establecía que el progreso fuera del centro a la periferia (porque el centro estaba dando muestras de «atrocidades y torturas sin nombre»), a la vez que postulaba el principio humanista de que la esperanza residía en la educación de la juventud.

Desde la crítica a un eurocentrismo que plantea la subordinación entre la Europa central y la América periférica, Gregorio Weinberg propone las ideas de

Chile, las escuelas de América del Sur están lejos de alcanzar el ideal realizado aquí. En Uruguay, Las Piedras y Malvin están animadas por este mismo espíritu, pero muchas otras escuelas se dedican a abrumar al niño con la disciplina en lugar de liberarlo! Es un regalo, una alegría y un consuelo ver una escuela como ésta! Gracias!» en Soler Mata, *Entre Europa i Amèrica Llatina: Adolphe Ferrière i l'Escola Nova a Barcelona*, cit., p. 235 (traducción propia). Esta expresión, que parece contradecirse con lo que se plantea hasta ahora, reafirma sin duda la posición de Ferrière como un predicador que decía a su público lo que el público quería escuchar. De todas maneras (además de que la de Guinardó era una escuela pública pero experimental), las ideas plasmadas en periódicos como *Les Nouvelles Littéraires* o en las ediciones en francés y en castellano de la crónica de su viaje, a simple vista tan opuestas a su mensaje en Barcelona, tuvieron una difusión y alcance mucho mayor que la dedicatoria del libro de visitas de la escuela de Guinardó.

⁶³ Ferrière, *La escuela activa en América Latina*, cit., p. 14.

⁶⁴ «Sur ce point aussi, mon petit livre doit apporter un témoignage qui convaincra les plus sceptiques et suscitera – qui sait? – l’émulation des pays du vieux continent [...]» en Ferrière, *L’éducation nouvelle en Amérique latine*, cit., p. 6.

⁶⁵ O. Compagnon, *Influences? Modèles? Transferts culturels? Les mots pour le dire. América, «América: Cahiers du CRICCAL»*, vol. 1, n. 33, 2005, pp. 11-20.

⁶⁶ *Ibid.*, p. 7.

destiempo y asincronía para pensar la historia latinoamericana⁶⁷ y comprender el supuesto desarrollo tardío del continente. Destiempo y asincronía que en los tiempos educativos significó el acercamiento de los sistemas escolares latinoamericanos a los modelos pedagógicos renovadores que tanto impactó a Ferrière, y que para Weinberg significaba, medio siglo después, la manifestación no de un atraso, sino de un tiempo específicamente latinoamericano.

Si bien el pensamiento des/pos colonial abre la posibilidad de pensar cada región según su temporalidad específica sin tener necesariamente que emular una temporalidad dominante, autores como Arif Dirlik nos advierten de que «[l]a complicidad de lo poscolonial con la hegemonía reside en la distracción poscolonialista de la atención de los problemas de dominación social, política y cultural»⁶⁸. Sin omitir esto último, el viaje de Ferrière es un elemento a tener en cuenta al momento de analizar los procesos de circulación de las ideas pedagógicas, así como para generar una mayor comprensión de los procesos educativos que ocurrían a ambos lados del Atlántico.

⁶⁷ G. Weinberg, *Tiempo, destiempo y contratiempo*, Buenos Aires, Leviatán, 1993.

⁶⁸ A. Dirlik, *El aura poscolonial*, en Sandoval (comp.), *Repensando la subalternidad. Miradas críticas desde/sobre América Latina*, cit., p. 57.

The early days of educational television and the case of «L'Approdo»: a critical reconstruction through historiography

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ABSTRACT: From 1954 to the present Rai has played a crucial role in defining the countenance of Italy's collective consciousness and its cultural identity. Due to the distinctness of Italian TV in its early days, it was decided to concentrate on it; Italian TV originated as a monopoly and had significant «educational» value. Its point of arrival was the Sixties: control of Rai switched hands from the government to the Parliament, while television production changed to bear competition from private networks. The study was conducted through a detailed analysis of Rai Annual Reports and scholastic and cultural programs, with a focus on the program «L'Approdo», an important example of «permanent education».

EET/TEE KEYWORDS: History of educational television; The early years of Italian television; Scholastic and educational programmes; «L'Approdo»; Italy; XXth Century.

Thinking of the early days of Italian television entails calling to mind, first of all, the educational and political value it heralded. There is no doubt that from the mid fifties to the present, Rai has contributed considerably, to the definition of the countenance of the collective consciousness and cultural identity of Italy¹. However, while television today seems to respond prevalently to market dynamics, and is sometimes even able to alter social and ethical function, at the time of its debut the intent of this new means of communication was to respond to a moral and educational urgency. The educational intent moved all those who worked behind the camera, while they attempted to measure up in relation to a tool deemed relentless and having no *competitors*, which stormed into

¹ D. Garofalo, V. Roghi (edd.), *Televisione. Storia, immaginario, memoria*, Soveria Mannelli (CZ), Rubbettino, 2015.

domestic intimacy, thus imposing responsibility, lucidity and probably courage on those who held the reins².

The present study proposes a critical investigation into the problem of educational TV of the first 20 years with reference to the historic cultural programme «L'Approdo» and in the light of historiography and Rai annual reports, beginning in 1952 until the reform. Before examining the characteristics and the value of that television, we must first analyse its context of reference and the connections inherent to the structure of this *medium*, in order to attempt to prove, scientifically, its educational and political relevance. There is a leitmotif which links culture, industry and politics to what Eco said can be defined «Paleotv»³. And if this is still true today, albeit in a surprisingly changing scenario, it is indisputable that from its beginnings TV triggered an innovative process for the time, based on reciprocity between itself and these different sectors of interest.

The date was 5 January 1954: Italian television was born, as a monopoly⁴ and beginning a few years earlier, as Franco Rositi's voluminous work about the decade from 1952 to 1963⁵ entitled «Radiocorriere»⁶ testifies – the new *medium* was subject to moral and social concern and was the object of much debate. To this regard, the age-old controversy between «apocalyptic and integrals»⁷, which is useful for introducing the first couple which will be analysed: the one between culture and TV. There was heated debate among the intellectuals of the time about the nature of television, how it was different compared to other media, about the specificity of its language and whether or not it was possible to produce art and culture using this medium. This reflection led to a real division regarding how to conceive the new medium: TV was to be interpreted as a «diabolic creation» – this was the prevalent attitude of left-wing and anti-capitalistic intellectuals – or, on the basis of Catholic opinion, as a «territory to occupy»⁸. The expression of Alberto Moravia on the subject was emblematic: «Television audiences are second class audiences»⁹, a testimony

² R. De Angelis Bertolotti, *Storia della nascente televisione italiana e dei suoi uomini dimenticati*, Bologna, Odoya, 2017.

³ U. Eco, *Sette anni di desiderio*, Milan, Bompiani, 1983.

⁴ A.C. Jemolo, *Monopolio e libertà*, in A. Visalberghi, G. Fantin (edd.), *Televisioni e cultura*, Milan, Tip. G. Colombi, 1961, pp. 101-104.

⁵ F. Rositi, *Catalogo analitico e metodico degli articoli in lingua italiana riguardanti la radio-televisione e i problemi della cultura di massa 1952-1963*, Milan, Istituto Agostino Gemelli, 1966.

⁶ Among the Rai magazines, published between 1954 and 1974, it's possible remember: «Radiocorriere Tv», edited from 1954 to 1995 (from 1924 to the advent of television, the headline was «Radio Orario»), «La nostra Rai» (1954-1974) and «Notizie Rai» (1961-1972), together with the 400 «Servizio Opinioni» booklets, held in the Rai Library in Teulada's street to Rome.

⁷ U. Eco, *Apocalittici e integrati*, Milan, Bompiani, 2003.

⁸ G. Crapis, *La parola impreveduta. Intellettuali, industria e società all'avvento della televisione in Italia*, Rome, Edizioni Lavoro, 1999, p. 8.

⁹ A. Grasso, *Il dissodatore appassionato*, in Id. (ed.), *Storie e culture della televisione italiana*, Milan, Oscar Mondadori, 2013, p. 6.

of how, for a certain part of Italian *Intelligenza*¹⁰ at the end of the fifties, the tendency to entrench themselves behind the shield of «noble» culture at the expense of «inferior» culture, meaning the «mass» culture dispensed by TV. However, at closer examination, this cultural and ideological prejudice which combines with a neo-phobic tendency and with a certain opposition to change – and therefore with a sort of divorce from modernity – which was well-represented by part of left-wing Italian intellectuals, does not seem objective and at the least unfounded today, if we consider the fact that television was anchored to the humanism in which our national culture is rooted: in fact, for the most part authors and programmers came from the academic world or publishing houses.

The attitude of intellectuals of the Catholic area was different. Their opinion of the diffusion of television was prevalently optimistic. They displayed a marked educational interest in TV as a monopoly. Within the Italian cultural industry, it could be detected that the Catholic sphere controlled the media on the public front and hence exercised its control over radio and television, while the left had carved out its autonomy in film and publishing. It is fair, therefore, to recognize that Italian mass culture was first and foremost a Catholic culture¹¹. Furthermore, it is very close to the truth to say that, in the field of means of information and mass cultural diffusion, «the project which historically speaking was carried out in Italy during the years of the economic boom, directed by the Catholic party, had no competitors [...]»¹².

The second important link, after the one with culture and thus, with the Italian *Intelligenza* of the time, that the new *medium* established was with the culture industry¹³. In Italy, the first experimentations were carried out from 1949 to 1954. If it is true that in Great Britain television was born in 1936, it is legitimate to say that programming in Italy had a late start compared to other European countries. Nevertheless, Italy caught up quickly; indeed we can speak of the country's surprising overtaking regarding both technological upgrades and the number of hours broadcast¹⁴.

A few months before the official date of broadcast on 10 April 1954 – made possible by the decree of the President of the Council in January 1952, which approved the new agreement between State and Rai – Rai, retaining the same

¹⁰ A. Grasso, *Gli intellettuali, la televisione e la cultura*, in Aldo Grasso, Massimo Scaglioni (edd.), *Schermi di Autore, Intellettuali e televisione*, Rome, Rai Eri, 2002, pp. 13-19.

¹¹ A. Grasso, *Cristalli di massa*, in G. Bettetini (ed.), *Televisione: la provvisoria identità italiana*, Turin, Fondazione Giovanni Agnelli, 1985.

¹² F. Monteleone, *Storia della Rai dagli alleati alla Dc (1944-1954)*, Rome-Bari, Laterza, 1979, pp. 218 and following.

¹³ F. Rositi, G. Bechelloni (edd.), *Il sistema delle comunicazioni di massa in Italia*, «Problemi dell'informazione», vol. 2, n. 1, 1977, pp. 29-45 and bibliographical information contained therein.

¹⁴ «Annuario Rai 1954-1955-1956», p. XXIII.

acronym, officially changed its registered name: from Radio Audizioni Italia it became Radiotelevisione Italiana.

The advent of television deeply transformed Rai which in a short time became a true unprecedented «factory of consumer products» and at the same time an influential holding company which was able to determine fundamental economic questions in the country (think of public tenders, technical choices for installations and investment in construction). The emergent television industry was witness to a sort of integration between the economic and political-cultural function, which guaranteed Azienda di Radiotelevisione Italiana a determining role in the process of transforming Italy¹⁵. With the beginning of the television business, therefore, Rai – which, as we can read in the provisions of Iri, Istituto per la Ricostruzione Industriale (Institute for Industrial Reconstruction)¹⁶ – became the undisputed protagonist of Italian economic development.

According to Giovanni Cesareo, between 1954 and 1964 the turnover of industrial and commercial electromechanical and electrical groups was quite high, amounting to 700-1,000 billion Lire¹⁷. The birth of TV, with the consequent expansion of the structure of the Rai firm, took place in the phase known as the «economic miracle». Actually, the standard of living of Italians between 1945 and 1955 remained quite low, agriculture continued to be the largest occupational sector¹⁸ and the majority of the population expressed itself in local dialects. But in less than a decade Italy became one of the most industrialized nations of the West.

In the second half of the fifties industrial concentration set the stage for a decline of the price of TV sets. The phenomenon of collective viewing, concentrated above all in public places (people watched TV at cafés, in parishes, at club headquarters, in party headquarters) and in private houses, created the premises for a new model of socialization which was unprecedented in the country¹⁹. It was the phase of TV which Carlo Sartori²⁰ defines «elitist», in which television was constructed by the simple assembly of material which was broadcast and was directed at a culturally diversified audience: in this situation the primary grand objective had to be the development of a standardised audience, of a mass audience.

Leaving behind, for a moment, the television-culture and television-culture industry pairings, we must analyse the close link between politics and the early days of Italian TV. The concerns the *medium* aroused at its debut were

¹⁵ F. Monteleone, *Storia della radio e della televisione in Italia*, Venice, Marsilio, 1999, pp. 275-330.

¹⁶ *Relazione del CdA*, «Annuario Rai 1953», p. 319.

¹⁷ G. Cesareo, *Anatomia del potere televisivo*, Milan, FrancoAngeli, 1970.

¹⁸ F. Alberoni, *Tv e vita italiana*, Turin, Rai Eri, 1968.

¹⁹ C. Penati, *Il focolare elettronico. Televisione italiana delle origini e culture di visione*, Milan, Vita e Pensiero, 2013, pp. 75-96.

²⁰ C. Sartori, *La qualità televisiva*, Milan, Bompiani, 1993.

prevalently political in nature. The ruling class already had a primigenial awareness of the standardising power of television, that from then on would completely revolutionise Italian society, turning it into a mass civilization. Progressively, both territorial and cultural distances were shortened, and society began to standardise initially its tastes, then consumption and finally its thought. There were two capital issues: the first was to create a chronometric sequence of programmes which was appropriate for a socially and culturally heterogeneous audience. In that post-war period, Italy needed a common language, shared cultural ideals, respected reference points and also some lightness and leisure²¹ and TV seemed to be the instrument most capable of rising to the occasion and satisfying all these needs. Furthermore, and we have arrived at the focus of the present study and at the same time, at the second issue regarding the political nature of TV, evidently, the more important of the two: there was a need to point the audience in the direction of a «correct» educational viewing of TV. To understand the reasons and the relevance of this last statement we must shed light on the historical-political scenario which marked the advent of Italian television, by examining the period from 1954 until the reform in the mid seventies, in which Rai went from governmental control to parliamentary control. What happened inside and outside Rai in that twenty year period which ended with the end of the television monopoly and the *boom* of private radio and TV²², an event which affected Italian TV production so deeply? On close inspection, it was a phase which was delicate and dense with historical-political happenings in Italy. It was the Christian Democratic party (DC) which perceived, before the others, the bearing this new *medium* could have in consolidating its party and, more generally, the repercussions it would have on society²³. Actually, reconciling Catholic tradition with mass tradition, was not an easy task. Nevertheless, finally, we can say that TV represented an opportunity to put modernity and Catholic moral principles together. Two aspects influenced Italy's budding TV: first of all, governmental control by the Christian Democratic area and secondly, the permanent incisiveness exercised on it by the fascist Eiar. With reference to this, Giulia Guazzaloca speaks, in fact, of a television which was «Christianly educational»²⁴. Actually, likewise, on the basis of Franco Chiarenza's²⁵ analysis, the common conviction of the members of the DC that regardless of internal divergences TV had to have an educational and at the same time didactic purpose in spreading Catholic morals emerges.

²¹ I. Piazzoni, *Storia delle televisioni in Italia*, Rome, Carocci, 2014, pp. 63-105.

²² R.A. Doro, *In onda. L'Italia delle radio libere ai network nazionali 1970-1990*, Rome, Viella Editore, 2017.

²³ S. Ottolenghi, *Signore e signori, va in onda la Dc*, «L'Europeo», n. 3, 1975, in *Storia della Rai. La lenta agonia del servizio pubblico*, «L'Europeo», vol. 9, n. 5, 2010, pp. 106-108.

²⁴ G. Guazzaloca, *Una e indivisibile. La Rai e i partiti negli anni del monopolio pubblico (1954-1975)*, Florence, Le Monnier Università, 2011, pp. 125-134.

²⁵ F. Chiarenza, *Il cavallo morente*, Milan, FrancoAngeli, 2002, pp. 51-78.

The Pci (Italian Communist Party) also embraced the idea of pedagogic TV, but intended it as an instrument to be used for the class struggle. In turn, lay parties were against the paternalistic set-up of this public service and suggested solutions like journalists' professional autonomy and control by an organism of guarantors.

Between 1954 and 1956 the chief executive officer was a man from Azione Cattolica (Catholic Action), Filiberto Guala. His memory in Rai is linked principally to two aspects: the training of expert television professionals, recruited from among the best university graduates in Italy, the famous «privateers» and the realization of the notorious «self-discipline code»²⁶ i.e., a set of Catholic moral rules of conduct to be observed by all involved in Rai programmes. Guala's nomination at Rai coincided, the same year, with the election of Amintore Fanfani as secretary of DC; with Fanfani DC moved closer to left-wing parties by becoming a centre-left party which had the television question close to its heart.

In 1956, then, Guala resigned, and a new urgency arose: Rai had to wed the Catholic cultural project and the profit of the culture industry. Two important people were hired to attempt to achieve this goal: Marcello Rodinò was C.E.O. of Rai for three three-year terms (1956-1964) and Rodolfo Arata, in the role of general director of Rai from 1956 to 1960. By and large, Rodinò and Arata were able to face that period of political instability that preceded the opening up toward the left. They doubled the number of branches while Italian TV underwent a turn toward secularism. However, despite the fact that TV was becoming more lay the interference of the Church remained strong. Consider, for instance, the number and importance of the encyclicals published in those years: Pius XII's *Miranda prorsus* in 1957, which represented the development of Pius XI's *Vigilanti cura*, or the conciliar decree *Inter Mirifica* or the pastoral instruction *omnium et progressio* (1971)²⁷.

But what was this television made up of? It was the time of the *Americanway of television*; in the Italy of the fifties and sixties the allure of American models (and therefore consumerism as well) found in TV the ideal means to become part of the Italian collective consciousness²⁸. What favoured this phenomenon, which had been slowed by Catholic culture when it first burst onto the scene, was the low economic level that characterized that country in those years. Nevertheless, it is important to clarify that America entered Italian households through video, but with a precise design to adapt to Italian mentality, as highlighted in Rai

²⁶ «Codice Guala», 1954. *Codice di autodisciplina televisiva – Norme interne*, in 3 Gennaio 1954. *Cinquant'anni di tv*, Dossier edited by Rai Library-Teche, 2014, pp. 64-71.

²⁷ C. Mannucci, *Lo spettatore senza libertà. Radio-televisione e comunicazione di massa*, Bari, Laterza, 1962, pp. 271-284.

²⁸ G. Bettetini, *American way of television. Le origini della tv in Italia*, Florence, Sansoni Editore, 1980.

Annual Reports²⁹. For this reason, as well as on the basis of Pietro Scoppola's observations, we can argue that in Italy «Americans' Americanism» was actually the result of an original home-made product, which was surely a re-adaptation to the reality of Italy³⁰.

The managing directors of Rai fostered the economic *boom* by stimulating consumption, but to avoid fomenting class hatred, they did it with moderation. Conversely, the American model associated consumption of goods with a lifestyle which was considered attractive, but was the total antithesis of the daily reality of Italians at that time. If we look closely, we can observe that even advertising became an educational and pedagogic action: in 1958 *Carosello*³¹ saw light. This programme succeeded at entertaining, reassuring, teaching and selling to an extremely diverse audience, which, every evening at precisely 8:50, sat in front of the TV for 10 minutes, children included! A purchase, a private action, was turned into a justified social action which was shared and free from those anachronistic ideologies of parsimony and sobriety that had echoed until then, from the south to the north of the boot. It can therefore be affirmed that Italian TV simultaneously disseminated both Catholic and consumer culture.

Beginning in the sixties, there was a significant increase in the number of television subscribers, the amount of advertising and investments both on the construction front as well as the technical one; in 1961 the second channel was launched. When, subsequently, Ettore Bernabei became general director³² of Rai the Christian Democratic party's hegemony over the radio-television apparatus was confirmed, reconciling simultaneously the demands of the different social, cultural and political forces of the nation. Bernabei, Fanfani's right-hand-man³³, had a challenging task at hand: to turn Rai into a factory of consensus. His Catholic cultural project distinguished itself thanks to certain particular features: collaboration with qualified people from the opposition, attention to the educational *mission*³⁴, building up the television offer, a scientific study of

²⁹ *L'organizzazione dell'esercizio e le prove sperimentali dei programmi*, «Annuario Rai 1953», pp. 339-349. In addition see «Annuario Rai 1962», pp. 417-419 on this topic.

³⁰ P. Scoppola, *Le trasformazioni culturali e l'irrompere dell'«America way of life»*, in L. Pazzaglia (ed.), *Chiesa e progetto pedagogico nell'Italia del secondo dopoguerra 1945-1958*, Brescia, Editrice La Scuola, 1988, pp. 476-493.

³¹ D. Cimorelli, S. Roffi (edd.), *Carosello. Pubblicità e televisione 1957-1977*, Milan, Silvana Editore, 2019.

³² R. Morrión, *La Rai nel paese delle antenne. Uomini e vicende del più discusso dei mass media dall'era di Bernabei all'era della riforma*, Rome, Napoleone, 1978, pp. 21-27. In addition, see also B. Vespa, *Rai la grande guerra. 1962-2002: quarant'anni di battaglie a Viale Mazzini*, Milan, Mondadori, 2002, pp. 43-44.

³³ To this regard it is interesting to see an unpublished thank you letter written to Ettore Bernabei by Amintore Fanfani, on the occasion of his acceptance of the nomination to General Director of Rai (January 1961), Rai Library, Viale Mazzini (Rome).

³⁴ A. Gismondi, *Il mondo con le antenne*, Rome, Editori Riuniti, 1957.

the show schedule³⁵ and internal restructuring of the organization of work³⁶. In contrast with the previous management, which had invested considerably in technology and new buildings for the firm, Bernabei targeted programmes and their contents. But in order to innovate and renew programmes he had to replace people. When Bernabei arrived in Rai there were 4,000 employees; in 1974 (the year the CEO resigned) they had risen to 12,000³⁷, Bernabei's strategy for changing the old Rai executives and directors was to surround them with new worthy professionals. In general, Bernabei's policy corresponded to his centralizing working style, with close control over everything, while information programmes remained the most closely controlled genre because it was central at a political level.

Gradually, there was a passage from community consumption of television to consumption by individual households. Beginning in 1966, in fact, 75% of the population owned a television set; from then on for at least three years, there was a further significant expansion of the television sector, which grew at the same rate as the debt created by Bernabei's management, which had concentrated too much on politics and less on economic-administrative aspects. At the same time Gianni Granzotto, who had replaced Rodinò as CEO promoted an intervention to study the reorganization of the company assigned to «three experts» Gino Martinoli, Giuseppe De Rita and Salvatore Bruno: it was the first indication for transforming Rai into a modern capitalistic firm³⁸. The opinion of the three wise men was the basis for the design of service order n. 376 of 1969, which ended internal conflict and determined the structure of the company for the following twenty years. «Roughly, this was the criteria: senior management to the Christian Democrats, junior and assistant management to the Socialists»³⁹.

In this way Rai was once again the pre-emptor to the future debate and balances of national politics⁴⁰. The crisis of the centre-left took place in 1968. Civil society was changing and with it changed certain political balances, that were no longer appropriate for the new social situation. The governments which ensued from the end of the sixties to the beginning of the seventies continued to be run by Dc, with the support or participation of socialist and lay parties, despite this, they did not possess their own stability.

³⁵ L. Barra, *Palinsesto. Storia e tecnica della programmazione televisiva*, Rome-Bari, Laterza, 2015.

³⁶ F. Morandi, *La via dell'Inferno. Il progetto cattolico nella storia della televisione italiana*, Bologna, Odoya, 2009, pp. 44-52.

³⁷ P. Ortoleva, M.T. Di Marco, *Luci del teleschermo. Televisione cultura italiana*, Milan, Mondadori Electa, 2004, pp. 158-161.

³⁸ *Ibid.*

³⁹ E. Bernabei, G. Dell'Arti, *L'uomo di fiducia. I retroscena del potere raccontati da un testimone rimasto dietro le quinte per cinquant'anni*, Milan, Mondadori, 1998, p. 184.

⁴⁰ G. Gnagnarella, *Storia politica della Rai, 1945-2010*, L'Aquila, Textus Edizioni, 2010. cit., p. 82.

All the features that characterized those years were transmitted through television programmes. The reform of Rai, which kept jurists, politicians and journalists busy for the entire first half of the seventies, came about in this climate. It was launched, at a time of crisis for Dc, in 1975 (law n. 103, of 14 April) and it established, first and foremost that the axis of public service be moved from the Government to the Parliament to ensure more pluralism, completeness and objectivity. At this time, furthermore, thanks to the reform which opened to the liberalization of the market, numerous radio and television broadcasting stations opened, at the expense of Rai which, on the contrary, was having an increasingly hard time holding its own against the new competition⁴¹.

It is interesting to focus attention on how the coming of private networks, that arrived on the scene at the end of the seventies, had a bearing on the pedagogic aspect of TV. According to Paolo Ardizzone, the perspective shifted from generalist popular programming which was still educational to generalist popular competitive programming, where a portion of financial resources was no longer guaranteed by the monopoly and it became necessary both to make investments based on innovative criteria, and move towards the tastes and demands of viewers⁴², pushing them toward consumption rather than emancipation⁴³. The inevitable adjustment to market rules brought with it, in time, the loss of the cultural brand of TV, at least as far as regards how it had been conceived by the forces that had made the decisions about the features and characteristics to give Italian television of the early years.

But what were the characteristics of educational TV of the early years? The «Rai annual reports», the numerous magazines of the time⁴⁴ as well as studies and research projects about public TV⁴⁵, represent tangible and manifest sources of how the authors and management of the Italian broadcasting company had, since the beginning, worked to ensure that television fulfilled its educational mission.

The cultural educational model which inspired Rai was European, based, therefore, on the notorious reithian triad «inform, educate, entertain»; this entailed investing the new means of communication with an important social responsibility, that of disseminating a defined cultural identity with a clear national footprint. However, in the case of Italian television there was a particularity that distinguished it from the other European TVs: it originated as a public service and this sufficed to explain both the investment and the

⁴¹ Monteleone, *Storia della radio e della televisione in Italia*, cit., pp. 333-396.

⁴² L. Zita, *Educhiamo alla televisione*, Rome, AIART, 1973-1974. They are three booklets published by AIART, Italian association of radio listeners and television viewers.

⁴³ P. Ardizzone, *Televisione e approcci formativi. Per una pedagogia dei mass media*, Milan, Unicopli, 1997, pp. 35-37.

⁴⁴ See note 6 above.

⁴⁵ See, among others, *I programmi culturali analisi del contenuto ricerca eseguita per conto della RAI-TV*, Milan, Istituto Agostino Gemelli, 1966, or contributions by Rai Opinion Service.

moral responsibility it was endowed with. That television built with a single-channel show schedule (1954-1961), which targeted a unified audience, was characterized by a schedule tailored to the time, so that it could reconcile people's daily schedule with that of television. Indeed, the temporal dimension of television in the early days – or rather: its adaptation to the routine of social time – was a crucial feature of programming. When Rai had the monopoly, television aimed, in fact, at proposing programmes that guaranteed, on one hand, the functionality of the public service and, on the other, the protection of the audience from the fascinating power that television had⁴⁶. Referring to the early days of television, Umberto Eco, as mentioned above, speaks of «Paleo TV», meaning that paternalistic didactic television, dedicated to all the audience, concerned about the contents to direct at the audience, which had to be innocent, sometimes at the cost of lying.

Nevertheless, for as much as television prepared to welcome a vast and generalized audience, we must acknowledge that TV viewers, when TV was made available, were not adequately prepared to receive the messages that TV offered. There were, in fact, a set of factors which made the task that TV in its early days had assigned itself complex. First of all, we must consider the fact that, at least in its first years, TV sets were purchased only by the upper middle class and that most people spoke dialect depending on where they came from. Another element to look at was the backwardness of the school situation; therefore, the atmosphere that characterized the beginning of TV was an underdeveloped society with a still high rate of illiteracy.

Beyond the high rate of illiteracy, or in any case, low level of education, accompanied by a limited command of Italian, television should, regardless, have had an important educational role in standardizing the national language, bringing people from different places and different social levels closer⁴⁷. And not only that: most TV historians are convinced of the educational value of that TV, Franco Monteleone, Giuseppe Gnagnarella or Enzo Scotto Lavina⁴⁸, to name a few. The pedagogic intent was, in fact a programmed element manifested in every Rai annual report and it is confirmed by oral testimony collected preparing this study, by some of the personalities that contributed to making the history of Italian television⁴⁹. This can also be inferred from the analysis of the television programmes: the educational intent pervaded the entire range of genres programmed; from shows to entertainment, with the

⁴⁶ C. Martino, *Fenomenologia del palinsesto*, in F. Monteleone (ed.), *La televisione ieri e oggi*, Venice, Marsilio, 2006, pp. 273-282.

⁴⁷ T. De Mauro, *Storia linguistica dell'Italia unita*, Bari, Laterza, 1963.

⁴⁸ E. Lavina Scotto, *Il cantiere televisivo italiano*, Vignate (MI), Lampi di stampa, 2015, pp. 33-55.

⁴⁹ The reference is to the interviews of Francesco Devescovi, Franco Monteleone, Italo Moscati and Enzo Scotto Lavina collected by the author of these pages from 2014 to 2017.

exception of the news, which was reported, inevitably, in an official atmosphere and under strict political control⁵⁰.

Actually there are some different opinions regarding the educational power of TV in its early years. Think of the ideas of Giandomenico Crapis, Aldo Grasso⁵¹, or furthermore of the antithetic conception of the nature of the educational role of that television given by Roberto Farné⁵², who, without refuting its educational value, denies its effectiveness. Nonetheless, a certainty remains of the controversy which accompanied the birth of Italian TV: the didactic-educational features of the programmes targeting all generational segments.

One example is the importance of the educational characterization of monopolistic TV in realizing «TV dei ragazzi» (a programme for children)⁵³, centred around such content and values that Catholic Italy had adopted; it was so successful that it was not modified until the reform of '75. Or we could concentrate on the orientation of that television, which, at least in the phase defined «the replacement phase» in a dialogue between TV and school took on an educational or even scholastic orientation, with the programmes *Telescuola* (Teleschool) or *Non è mai troppo tardi* (It is never too late), contributing in this way to compensating for lack of schools for many children and not only children.

It is important to underline that programmes were devised and produced on the basis of surveys carried out by the Opinion Service that monitored users' needs. TV was like a window that showed people in the most remote places the world even though, in reality, there was not very much to see and everyone was sent to bed at midnight. At its debut, in fact, it was missing a proper mediological identity: it was not yet aware of its own potential, it had not discovered the strategic use of the «show schedule»⁵⁴ and it expressed itself by borrowing genres and repertoires from other *media*: the radio⁵⁵, the theatre and cinema.

But the educational orientation of television could be seen, as already stated, in the entire Rai show schedule, taking on, in the case of many shows, a function which, if not always educational, at least had an educational-training nature. Examples are short programmes like *Almanacco* (Almanac), *Sapere*

⁵⁰ G. Bettettini, *L'Italia televisiva chiama davvero l'Europa*, in *Televisioni in Europa*, Turin, Fondazione Agnelli, 1990.

⁵¹ A. Grasso, L. Barra, C. Penati (edd.), *Storia critica della televisione italiana*, Milan, Il Saggiatore, 2019.

⁵² R. Farné, *Buona maestra tv. La Rai e l'educazione da Non è mai troppo tardi a Quark*, Rome, Carrocci, 2003, pp. 9-60.

⁵³ Rai Servizio Opinioni-Istituto Agostino Gemelli, *Ricerche sulla tv dei ragazzi del 1967*, Turin, Rai Eri, 1971.

⁵⁴ F. De Vescovi, *La Rai di Massimo Fichera*, in A. Abruzzese, G. Barlozzetti, M. Bartocci (edd.), *La Rai di Massimo Fichera*, Rome, Rai Eri, 2013.

⁵⁵ Ortoleva, Di Marco (edd.), *Luci del teleschermo*, cit., p. 75.

(Knowledge), *Una lingua per tutti* (A single language for all), *Conversazioni con i poeti* (Conversations with poets), *Medicina Oggi* (Medicine Today) – a refresher programme for doctors, *TVM* – a programme for young people in the armed forces which disseminated cultural contents and information for professional orientation, *Processo penale* (Criminal court), *Incontro con la musica* (A meeting with music), *La nostra salute* (Our health), *Il corpo umano* (The human body), *Avventure della scienza* (Adventures in science), *L'amico degli animali* (The animals' friend), *Appuntamento con la novella* (Appointment with a short story). Vittorio Gassman's extravagant performances in *Il Mattatore* (The matador) and *Il gioco degli eroi* (Heroes' games) were highly appreciated as well. These programmes as well as TV dramas based on famous novels, chosen from Italian and foreign authors through a rigorous selection process⁵⁶, seem like indisputable evidence, today, of how TV carried out its mission of educating the general public. And the list goes on and on and constitutes in itself useful and functional subject matter which confirms the initial theory. It is sufficient to browse through one of the many files published by Rai which present the complete list of programmes⁵⁷ or the «Rai annual reports» in the section dedicated to the list of programmes of any specific year, to give what could seem a distant and abstract idea definitive concreteness. Today, it has been undeniably recognized how in Italy, after Fascism, TV and radio had a crucial role in compensating for the shortage of schools for many youth. Furthermore, TV was supposed, according to the best auspices, to remedy linguistic poverty and more generally, the cultural backwardness of the country; these resolutions made way for themselves in conjunction with the political choice to raise compulsory schooling to age 14 according to article 34 of the Constitution.

In 1958 Rai, in collaboration with the Ministry of public education, gave rise to the first course of secondary education for professional training on TV. It was called *Telescuola* (Teleschool), an educational programme aimed at poorer, deprived social classes or youth who lived in places where there was no public transportation or school buildings. In those years a heated debate arose about how effective TV education was compared to traditional education. They were the years during which Italian culture underwent significant changes: a reconsideration of Gentilian pedagogy and the advent of new disciplinary perspectives and theories. Indeed, from the analysis of «Rai annual reports» we do not find any intention of replacing traditional schools with TV courses like *Telescuola*; it is implied that the courses were a sort of transitory support⁵⁸,

⁵⁶ C. Escapon, A. Nicosia, B. Scaramucci (edd.), *La Rai racconta l'Italia 1924-2014*, Rome, Skira Rai Eri, 2014, pp. 72-73.

⁵⁷ See for example, Dipartimento Scuola Educazione, *Educazione e scuola in tv. Catalogo delle trasmissioni educative per adulti 1967-1976*, Rome, Rai Eri, 1978.

⁵⁸ *Trasmissioni culturali e di Categoria and Relazione e Bilancio Esercizio 1958*, «Annuario Rai 1959», pp. 379-381.

which would shortly thereafter leave room for different conceptions regarding how to dispense culture through TV.

And if *Telescuola* targeted a semi-illiterate audience, we must remember that, three years later, in 1960, Rai broadcast *Non è mai troppo tardi* (It is never too late) a TV programme hosted by the expert teacher Manzi⁵⁹, which taught millions of Italian adults to read and write⁶⁰, thanks to innovative creative teaching methods devised on a style which took into account the peculiarities of the *medium*. It was an actual Italian language course for illiterates, carried out by installing 2,000 television sets in viewing points all over Italy. Indeed, over the last half century Rai had become, together with school, the most important cultural agency in the country⁶¹.

What has been said to this point brings us to the first conclusion of this research: the early days of TV, with all its limitations, was an instrument of education and social cohesion. And while this is a characteristic which is extensively verifiable, as well as evident, if we examine the scholastic and educational television of those years, it is equally as obvious and striking to prove it – as has been done by examining a post-war cultural educational programme like «L'Approdo» (The Mooring) which is part of the TV experience defined «permanent education». Retracing the history of the longest-running cultural programme of the early years of Italian TV, to corroborate its educational function, turned out to be a fascinating journey, though undeniably more controversial, because of the peculiarities observed in the programme and because of its inherent principal intent: to disseminate «noble» culture to millions of TV spectators who were practically unfamiliar with it.

«L'Approdo» lived three lives – on the radio, as a magazine and on TV⁶² – all three faded out in time, but after a 32-year history, enough to certify that, in all its declination, the show was Rai's longest, most resistant and valued cultural feature programme. The intellectuals who collaborated on «L'Approdo» all had different ideas, but they were united by a common love of literature and more in general, culture. From the beginning the programme did not have the characteristics of a militant broadsheet but it entered the Italian panorama as an anthological magazine, which referred to both domestic and foreign texts⁶³.

There was room for contributions of both authors who were well-known and appreciated and younger ones (for example Pasolini and Zanzotto),

⁵⁹ R. Farné, *Alberto Manzi. L'avventura di un maestro*, Bologna, Bononia University Press, 2011. Furthermore, it's possible access to website <<http://www.centroalbertomanzi.it>> (last access: 20.12.2019).

⁶⁰ *Corsi di istruzione popolare*, «Annuario Rai 1965», pp. 63-64. See also: *Corsi di istruzione popolare*, «Annuario Rai 1966», p. 44 and following.

⁶¹ Segreteria del CdA Rai, *Televisione e cultura, Dibattito, dati, esperienze in Europa*, Rome, Rai, 2004, pp. 1-8.

⁶² L. Piccioni, *La linea editoriale de «L'Approdo»*, «L'Approdo Letterario», vol. 23, n. 79-80, 1977, pp. 117-122.

⁶³ *Ibid.*, p. 120.

selected with the usual rigour. The parameter the executive committee used when choosing the texts to use on the programme was that they should stand the test of time through the values they conveyed⁶⁴.

Italy was thirsty for culture as it attempted to get back on its feet on the rubble of the war; this is where the programme's success lies. All the authors and editors of «L'Approdo» were moved by educational intent and this was clear from the beginning, when, in 1945 Radio Firenze broadcast the first radio episode of «L'Approdo». The intent of all the collaborators was to take hold of an elite academic culture and address a country in which the high rate of illiteracy and the dispositions of Fascist culture had not permitted a «high» and «noble» culture to spread. The messages «L'Approdo» sent were qualifying, directed at more deprived social groups set in rural Italy; they were in a certain sense, a provocation using «noble» culture offered by poets and writers that in most cases had never been heard before by the majority of the population. An objective that was achieved, not only in view of the long run of the radio programme, but also by it becoming a printed magazine and then a television programme⁶⁵.

The authors of «L'Approdo» demonstrated that they continuously searched for methods and strategies that allowed them to confirm the effectiveness of culture on the radio and television and that at the same time testified their modernity. We can say, borrowing an expression from Andrea Mugnai⁶⁶, that «L'Approdo» was a (successful) multimedia experiment that was ahead of its time. A multimediality that was not yet integrated with its means, at least as far as we are used to considering it today; however, one noticed the courage on the part of the authors of the programme to constantly take new media paths. The fact of proposing the same contents over different media demonstrated – even at the time – awareness of the desire to transmit a message not in a substitutional way, but in a complementary way; from this point of view «L'Approdo» ended up being a product of great modernity. A modernity that is found in other characteristics of this cultural project as well: in its multidisciplinary nature, its Europeanism, its curiosity, conciseness, its will to clarify its choices, its vocation, its thought.

Of the 1397 radio airings of «L'Approdo»⁶⁷ only about 10 reels remain while the rest have been lost. From the radio recordings of «L'Approdo» and in particular from the contents dealt with, a more elevated conception of culture, literature and of intellectuals themselves emerges. Intellectuals who were asked

⁶⁴ A. Dolfi, M. C. Papini (edd.), *L'Approdo. Storia di un'avventura mediatica*, Rome, Editore Bulzoni, 2006, p. 444.

⁶⁵ A. Mugnai, *Il caso dell'Approdo*, in A. Sferrazza, F. Visconti (edd.), *Memoria e Cultura per il 2000. Gli anni de L'Approdo*, Rome, Rai Eri, 2001, pp. 33-38.

⁶⁶ A. Mugnai, *La grande cultura alla radio*, Florence, La Nuova Italia Rai Eri, 1996, pp. XXIII-XXIV.

⁶⁷ Piccioni, *La linea editoriale de «L'Approdo»*, cit., pp. 117-122.

many personal questions or questions about their private lives, because they were considered real examples to follow. The Executive Committee, which had formed in 1952, was, in fact made up of high-sounding names of the culture of the time: Riccardo Bacchelli, Emilio Cecchi, Giuseppe De Robertis, Nicola Lisi, Roberto Longhi, Giuseppe Ungaretti, Diego Valeri and Gianfranco Contini: they were the «Masters» with whom «L'Approdo»'s line originated. They were men who hailed from very diverse cultural and political experiences. Free from any political and social intent, the intellectuals who collaborated with «L'Approdo» were prevalently from Catholic or left-wing backgrounds. In general it was an anti-Fascist environment which was open to a series of issues linked to modernity with a propensity for adding value to and producing elite, refined and exclusive cultural forms that differed from those for mass consumption⁶⁸. The intention of Adriano Seroni, one of the creators of the programme to use radio to disseminate a cultural project like «L'Approdo» was not only innovative, it was even revolutionary. The choice of this medium reveals all its power, accompanying this creative effort for thirty years until 1977. Finally, culture could speak to the general public, a opportunity that brought together the most intelligent people in the country.

The nearness of literati to radio led in time to the emergence of a «natural desire to bestow a lasting role on words which seemed destined to complete oblivion once they had been broadcast»⁶⁹. From this will, in 1952, the experience of «L'Approdo Letterario»⁷⁰ (Literary Mooring), a quarterly magazine, was launched. In addition to the texts broadcast on radio «L'Approdo» the magazine also included equally respectable texts from other programmes. There was news about literature, music, theatre and cinema and anthological presentations of various Italian and foreign authors. From 1952 to 1977 Eri published a total of ninety-two issues of the print magazine. It is also worth noting that for unclear reasons, it was not published for three years, precisely from 1955 to 1957.

Examining it through today's eyes, «L'Approdo Letterario» magazine reveals peculiarities which make it unique. The first thing that emerges is that there is no programmatic statement, the focus on contemporary times and the educational intent: the latter is also detected in the orientation of contributions to permanent columns which, in a certain sense, limit (by guiding them) the audience's choices, while revealing a direct origin in the broadcast version⁷¹.

The third version of «L'Approdo» TV got under way on 26 January 1963, on Saturday evening, following the broad highly popular date with weekend entertainment. Akin to the radio programme, «L'Approdo» TV began its

⁶⁸ Cesarani, Remo *Il linguaggio radiofonico*, in *Memoria e Cultura per il 2000*, cit., pp. 92-99.

⁶⁹ *Presentazione* del primo numero de «L'Approdo», «L'Approdo Letterario», vol. 1, n. 1, 1952, pp. 3-4, article unsigned.

⁷⁰ It's possible access to online archive <<http://www.approdoletterario.teche.rai.it>> (last access: 20.12.2019).

⁷¹ Dolfi, Papini (edd.), *L'Approdo. Storia di un'avventura mediatica*, cit., pp. 59-70.

programming with well-finished features about a selection of topics; to end up turning into a single theme programme in the seventies. They needed to find a formula which would save the cultural and scientific effort of the programme that would simultaneously succeed at capturing the interest of a broad audience, including the less educated population. It had to communicate through images, give the floor to prestigious personalities in literature and art, deal with themes that up to then had been kept quiet, taking action in the sphere of the complex scenario of «cultural TV programmes»⁷².

Following the indisputable, long-lived success of this triple-souled cultural programme, at a certain point, due to the concurrence of several factors, the programme began to experience a difficult moment which it was unable to overcome. Actually, how the crisis of «L'Approdo» TV, and not only the TV version, was part of another more serious and structural crisis that struck Rai beginning in 1969 as clearly testified by the «annual reports», must be clarified⁷³. It was an unprecedented difficult economic circumstance in Company history that set off a sort of ideological depression at Rai's core. The relentless standardisation to models provided by private networks that Rai adopted beginning with the reform to stand up to stronger and more threatening competition, manifested itself with an obvious decline of the values of educational TV on which State TV had founded its cultural policy in its first twenty years of activity. Television had changed and the first change regarded the number of programmes which rose considerably in those years. The quantity explosion, however, brought about a change in quality since commercial TV networks established themselves by trivialising their offer or importing American programme formats to Italy.

There were also internal reasons that contributed to «L'Approdo» closing. The Opinion Service Radio Support Group documented a significant decline in the number of listeners of the show beginning in 1967, while in 1969 the magazine had a consistent decline in sales⁷⁴. In turn Eri's economic deficit played a determining role in shutting down the magazine, as did the death of the «Masters», as Piccioni defines them, i.e., men like Ungaretti, Longhi, Gatto who had guaranteed the magazine's editorial coherence and indisputable prestige. Finally, a sudden change in the audience's interest must not be overlooked; sociological, polemical, political themes were preferred over literary and artistic ones⁷⁵. However, the presence of criticism of the TV version of «L'Approdo», considered, in some cases, an elite, detached, formal thus not edifying, programme must be noted. Nevertheless it has been possible to find four reasons which allow us, at least, to discuss these hypotheses, which in the

⁷² Rai Radiotelevisione italiana, *Dieci anni di televisione in Italia*, Turin, Rai Eri, 1964, p. 249.

⁷³ *Relazione del CdA Rai*, «Annuario 1969-1970», pp. 551-552; also analyzes: *Relazione del CdA*, «Annuario Rai 1971», pp. 375-380.

⁷⁴ Dolfi, Papini (edd.), *L'Approdo. Storia di un'avventura mediatica*, cit., pp. 500-515.

⁷⁵ Piccioni, *La linea editoriale de «L'Approdo»*, cit., pp. 117-120.

end, are not solidly founded. The first aspect to highlight is that the judgement seems to be filtered by nothing other than today's vision, which is devoid of the historical-social adjustment of the time. It is as if, moreover, we do not take into consideration survey data, the dense interested correspondence between TV authors and viewers found in, for example, «Radiocorriere»⁷⁶ or the programme intentions stated in the reports of Rai's Board of Directors. Additionally, data from the Opinion Service—that are statistically reliable, though obliged to exemplify an unstable matter, such as the audience's tastes – had detected, from the debut of «L'Approdo» TV, that there was no doubt about viewers' interest in cultural TV programmes. That data, in fact, demonstrated that the audience, beginning in the sixties, was changing, that it was honing its demands. It no longer requested only brilliant, entertaining programmes with easy music and variety shows, but also something more demanding⁷⁷: programmes that analysed current issues, broadcasts about history, politics and sociology, the arts, in other words, knowledge, in general⁷⁸.

There is more: «L'Approdo» TV abolished interviews based on written questions and answers, which were invariably present in cultural radio programmes in the fifties, obliging the authors to express themselves without looking at a sheet of paper; «this entailed inputting spoken language, dissolving the rigidity of frameworks and adapting to the immediateness of journalistic reports»⁷⁹. The fact that the programme was characterised by a slow pace, static frames, and obsolete set design, is undeniable if compared to current television. But, we must not forget that that was TV from another era: they were still getting their bearings with the new medium and they were doing it with results, responding to the educational needs the country urgently demanded.

The second reason, which leads to a rethinking of the negative opinion of «L'Approdo» TV must be traced back to the fact that the programme was the object of a media transposition: it debuted as a radio programme in 1945, became a literary magazine in 1952 and finally evolved into a TV programme in 1963. It is evident that in these passages, the necessity to remain loyal to coherence in the declination of a common spirit using different means of communication, exposed it to external interference which could intervene in the TV programme, influencing style and form. What was contested was the fact that culture was, in many cases, inserted into mass communication using a language that belonged to the traditional instruments used to transmit culture. It was held that in this

⁷⁶ F. Rispoli, *Le ragioni e i gusti del TT*, «Radiocorriere», vol. 44, n. 33, 1967, pp. 16-17. See also P. Abruzzini, *S'informano, protestano, ma soprattutto chiedono autografi*, «Radiocorriere», vol. 46, n. 50, 1969, pp. 36-38. See also the online archive of the magazine: <<http://www.radiocorriere.teche.rai.it/>> (last access: 20.12.2019).

⁷⁷ I. Moscati, *I programmi «impegnati» del sabato sera*, «Radiocorriere», vol. 44, n. 40, 1967, p. 35. See also *I programmi televisivi*, «Annuario Rai 1960», p. 105 for this aspect.

⁷⁸ F. Rispoli, *La tv è mobile*, «Radiocorriere», vol. 44, n. 29, 1967, pp. 16-17.

⁷⁹ Cattaneo, *Testimonianze*, in *Memoria e Cultura per il 2000*, cit., pp. 177-179.

way «noble» culture was made to coincide almost necessarily with writing, while the difference between the spoken word and fake spoken word which was broad via radio, was not acknowledged by some of the intellectuals. These are aspects that are contradicted by the fact that, in truth, broadcasting, as mentioned above, had taken giant steps forward over the years when it comes to technical and linguistic innovation.

The third reason comes from the idea that «L'Approdo» promulgated a culture which was overly elite and therefore elevated, oriented exclusively towards a limited qualified audience. In truth, at the start the programme the authors' objective was diametrically opposed to this conception. Rai worked hard, from the beginning, to prepare both radio and TV programmes and exercised considerable piece of mind making and broadcasting them. In view of this it certainly could not adopt the solution of containing the programmes in that minimum requirement that was common to all, because that would have made them too uniform and scarcely accepted by audiences, who would have distanced themselves because they did not feel they were adequately stimulated and thus reducing the effectiveness of television and failing at its social function⁸⁰.

The fourth and final reason pinpoints, in the accusation of detachment and austerity ascribed to the TV programme a mere reflection of the personality of the intellectuals who headed it. One of the most interesting aspects of «L'Approdo» is the one linked to its protagonists, important figures who had the ability and enthusiasm to unite and direct what could be defined an actual «cultural firm». It was, as previously mentioned, the national *Intelligenza*, but prevalently Florentine, regulars at Le Giubbe Rosse or Il Gabinetto Vieusseux or L'Aragno in Rome⁸¹. The intellectuals of «L'Approdo» were by character often rebellious and sensitive, at times even detached and excessive and, for this reason, not capable of creating immediate empathy with their audience. The same intellectuals, as mentioned earlier, harboured opposition to TV considering it, especially in its early days, unsuitable for transmitting culture. With these premises it follows, lastly, that the attitude of these literati reflected in part on the programme they realised. Nonetheless, the love of literature of those who Piccioni called «Masters» plucked the audience's heartstrings not only through the values the poems and short stories dispensed, but also and above all thanks to these good teachers that loved their subject matter and thus knew how to convey it.

⁸⁰ *Relazione CdA Rai*, «Annuario Rai 1957», pp. 302-305.

⁸¹ O. Calabrese, *La Rai delle origini: tra pedagogia e intrattenimento*, in *Memoria e Cultura per il 2000*, cit., pp. 39-46.

At the end of this discussion, it has been possible, therefore, to arrive at two main conclusions: the first is that TV in its early days was educational, the second, on the other hand, is that «L'Approdo» was an ambitious and successful expression of that TV. Among the reasons that led to this second conclusion e therefore to validate the pedagogic intent of the programme are the peculiarities and willfulness of its creators. In view of the absence of shared political intent, as declared in *La linea editoriale* (The editorial line) of «L'Approdo», which represented a sort of nostalgic programming manifesto, with which Piccioni bid farewell to readers, one objective remained: the educational one. Mission accomplished, even in those cases in which «L'Approdo» «only» had the merit of having made the faces of Italian writers a familiar sight⁸². Further to this point, we observe that in the face of television's power to make uniform and standardise the public, «L'Approdo» made the complex resolution to elevate it, to raise its level, and give to all what was previously for a select few. The final result was the same in both cases, i.e., the cultural standardisation of the general public which, as is known, is the outcome of an intrinsic mechanism of television dynamics. Nevertheless, TV audiences would not simply have been more uniform on a cultural level, but also more educated in so much as the contents were those of an elevated culture, albeit with diversified effects of saturation.

Furthermore, more than elsewhere, the pedagogic intent of the programme emerged from the analysis of the contents of what in the multimedia Catalogue⁸³, at the entry «Rai genre», is defined as an «educational programme for adults over 18». The topic of arts and literature was interpreted through a wide range leading themes, as the lengthy sought-after list of Italian and international artists and literati, some of whom were extremely well-known, are elements which clarify how behind the choice choice of contents of «L'Approdo» there was a refined study carried out by the intellectuals of the Executive Committee.

The success of the TV programme can be proclaimed, finally, on the basis of its audience. The programme averaged an audience of four million viewers, with peaks reaching eight million⁸⁴. If we consider that the average circulation of a fiction novel which sold well was three thousand copies and that, additionally, very few literary or magazines specialising in culture sold more than one or two thousand copies. Even the approval rating, which was quite consistent and over 60 could surely be deemed positive⁸⁵.

⁸² Rai Radiotelevisione italiana, *Dieci anni di televisione in Italia*, cit., p. 245.

⁸³ It is possible find information about it in this website: <<http://www.teche.rai.it/chi-siamo-2/>> (last access: 20.12.2019).

⁸⁴ W. Veltroni, *I programmi che hanno cambiato l'Italia*, Milan, Feltrinelli, 1994, pp. 20-21.

⁸⁵ Rai Radiotelevisione italiana, *Dieci anni di televisione in Italia*, cit., p. 249.

Today, «L'Approdo» represents a programme from the past of inconceivable modernity and at the same time, an historical memory that lasted over thirty years, which projects historical research into the future. And that is not all: in and of itself «L'Approdo» constitutes a precious source that allows further research into and in-depth analysis of the history of education through media, thanks to its exceptional repertoire of facts and images that tell a tale of art, literature, publishing, society and hence the cultural identity of the country, the same one that television has always and in its own way contributed to reflecting and drafting.

Crafts classes as one of the dimensions of aesthetic education in Polish elementary schools (1918-1939)

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ABSTRACT: Art – including applied arts – played an important role in transmitting national and humanistic values in 1918-1939 Polish universal education, also forming a tool for social change. Aesthetic education was understood very broadly and implemented through direct contact with nature, works of art, and by taking care of the external appearance of students and arranging their immediate surroundings: both at home and in school. Aesthetic education was primarily served by the so-called artistic activities, including drawing, singing and crafts. The article presents the issue of teaching crafts from the perspective of the idea of aesthetic education. The author analyzed curricula and subject literature, conducting a query of selected specialist magazines.

EET/TEE KEYWORDS: Elementary schools; Aesthetic education; Interwar period; Crafts; Poland; XXth Century.

Introduction

The second half of the 19th and the beginning of the 20th century brought revolutionary changes to the economic and social life of many European countries. This deep current of change also affected pedagogy. A thorough criticism of the traditional school and its intellectualism increased interest in the child's individuality and activity. What became widespread was the confidence in the educational value of independent work, including crafts, which apart from improving technical and manual skills, shaped the intellect and personality of the student¹. Crafts – based largely on the Swedish sloyd system – were

¹ The progressive approach to crafts classes was shaped under the influence of pedagogical views, among others of John Dewey, Hugo Gaudig or Georg Kerschensteiner. cf. G. Kerschensteiner,

introduced to Polish elementary schools after the First World War, noting their positive impact on the physical development of young people, strengthening the creative attitude, preparation for persistent, independent and systematic learning and work. In addition to introducing the elements of craft, technology and industry, crafts classes also introduced students to the world of aesthetic beauty².

The turn of the century was a special time – it was a time of cultural, social and educational transformations that were not without an impact on the issue of aesthetic education. When the demand for beauty arose in the industrial world, voices were raised to call for universal aestheticization of life, and a general rise of the social status of art. The ideas of egalitarianism and democratic access to artistic works, thanks to their pro-social overtones, went far beyond the model of strictly aesthetic education, which was available only for few. In the result, in Western Europe, reformist currents began to develop, seeking new social and educational solutions through art-related activities³. Here we should mention the pioneering activities of John Ruskin, William Morris or Jean-Marie Guyau⁴. As Mirosława Zalewska-Pawlak synthesizes:

The pedagogical and aesthetic movement in Europe stemmed out of dissatisfaction with the rationalism and didacticism of the contemporary school system, and from disagreement with the ugliness and tawdry of industrializing regions. The movement was vividly received and commented in Europe, including the lands of Poland⁵.

Critical studies of the western concepts by native nineteenth-century educators, such as Bronisław Trentowski, Karol Libelt, and Henryk Struve⁶, were of great importance for the Polish aesthetic and pedagogical reform; as well as later publications from the beginning of the 20th century, dealing with the broad problem of aesthetic education, authored by, among others Janina

Pojęcie szkoły pracy, Warszawa-Lwów, Wydawnictwo Książnica-Atlas, 1926; H. Rowid, *Szkoła twórcza: podstawy teoretyczne i drogi urzeczywistnienia nowej szkoły*, Kraków, Gebethner i Wolff, 1931; L. Bandura, *Szkoła pracy w ujęciu Kerschensteinera*, «Przyjaciel szkoły», n. 9, 1932, pp. 282-286.

² See: W. Przanowski, *Dydaktyka pracy ręcznej*, in S. Łempicki (ed.), *Encyklopedia wychowania*, 2 vols., Warszawa, Wydawnictwo Naszej Księgarni, 1936, pp. 620-632.

³ M. Zalewska-Pawlak, *Rola sztuki w wychowaniu. Polska tradycja pedagogiczna*, Łódź, Wydawnictwo Uniwersytetu Łódzkiego, 2001, p. 28.

⁴ Their views were known and discussed in Poland, as evidenced by the above publications and translations (to quote just a few): J.M. Guyau, *Zarys moralności bez powinności i sankcji*, Warszawa, Księgarnia M. Arcta, 1910; K. Kosiński, *Szermierze sztuki uspołecznionej (Tolstoj, Morris, Ruskin)*, Warszawa, Drukarnia M. S. Wojsk, 1928; M. Bujno, *John Ruskin i jego poglądy*, Warszawa, Księgarnia M. Arcta, 1901.

⁵ Zalewska-Pawlak, *Rola sztuki w wychowaniu. Polska tradycja pedagogiczna*, cit., p. 32.

⁶ E.g.: B. Trentowski, *Chowanna czyli system pedagogiki narodowej jako umiejętności wychowania, nauki i oświaty, słowem wykształcenia naszej młodzieży*, Poznań, Księgarnia Nowa, 1842; H. Struve, *Sztuka i piękno*, Warszawa, Księgarnia E. Wende, 1892; K. Libelt, *Estetyka czyli umnictwo piękne*, Poznań, Księgarnia J.K. Żupańskiego, 1849.

Mortkowiczowa⁷, Iza Moszczeńska⁸ or Stanisław Karpowicz⁹. The crucial consequence of the entire reform movement was the spreading of the belief that aesthetic culture forms an integral part of school education and general humanistic education¹⁰. It was assumed that all children should be covered by aesthetic education, focusing on developing their sensitivity through contact with beauty carriers, namely: nature, works of art and external environment (home and school). The harmoniously shaped personality of the man was considered the final goal of aesthetic education. The above assumptions were obviously affected by the intense development of experimental psychology, scientism and the emergence of progressive pedagogical trends associated with the movement of the progressive education¹¹; however, in the reality of Polish elementary schools, in the face of more significant problems, the psychological and pedagogical aspects of the reform were pushed aside. Katarzyna Dormus notes:

In the specific Polish conditions, the patriotic factor came to the fore, causing the whole issue of 'aesthetic education' to become a socio-pedagogical problem with a strong national overtones, rather than a purely pedagogical and educational issue¹².

In universal education, the social dimension of aesthetic education – which comes down to broadly understood raising the cultural level of members of society – clearly dominated the individual dimension, centred around the personal development of the student. There is also a kind of ambivalence of goals attributed to aesthetic education, occurring at various levels, and demonstrating the complexity of the very problem of aesthetic education. The presence of art in elementary schools of the interwar bi-decade had a strong national¹³ but also humanistic connotation; at the same time, it performed aesthetic and cognitive,

⁷ J. Mortkowiczowa, *O wychowaniu estetycznym*, Warszawa, G. Centnerszwer i S-ka, 1903.

⁸ I. Moszczeńska, *Zasady wychowania*, Warszawa, Księgarnia Naukowa, 1907.

⁹ S. Karpowicz, *Jakiej potrzeba nam szkoły*, Warszawa, 1905.

¹⁰ Zalewska-Pawlak, *Rola sztuki w wychowaniu. Polska tradycja pedagogiczna*, cit., p. 37.

¹¹ Some of the progressive approaches to teaching drawing, singing and crafts, known and applied, even in experimental form, in the Second Polish Republic are: J.L. Tadd's swing method, genetic method by F. Kuhlmann, the so-called Prang's method, O. Decroly's interest based method, H. Parkhurst's Dalton plan, correlation method, E. Jaques-Dalcroze rhythmic gymnastics, creative (individual) method of teaching crafts.

¹² K. Dormus, *Rozwój form wychowania estetycznego i nauczania rysunku w Krakowie w latach 1850-1914*, Warszawa, IHN PAN, 1998, p. 8.

¹³ For example: this is how Stanisław Reda wrote about the need to familiarize students with the national nature of music and art: «The teacher's task is to explain to the student that art is something that the human soul speaks through in its ups and downs, desires and aspirations. The student should know that art once stood at the cradle of mankind and will certainly will lead it up to its grave. [...] First of all, the student should learn at school that our nation developed its own, distinct culture that has allowed it to resist hostile violence, which in times of disaster decided about its spiritual independence». S. Reda, *Nauka śpiewu a wychowanie państwowe*, «Śpiew w szkole», n. 2, 1933-1934, p. 27.

educational (sometimes even propaganda) and religious, identification and integration, and utilitarian functions, and to a lesser extent ludic and emotional, and to a negligible – therapeutic ones.

To sum up: aesthetic education at that time was understood both as the transfer of knowledge in the field of history and theory of art, arousing sensitivity to beauty, sensory training, intellectual development, as well as improve manual skills of students (individual dimension), but also as raising the level of education of members of society, and their culture through interest in the issues of art, care for the aesthetics of their surroundings and everyday objects, and for monuments and relics of the past (social dimension)¹⁴.

For years, a group of so-called artistic or artistic and technical subjects, which included drawing, singing and handwork/crafts, existed in the Polish universal education system. While drawing and singing remain in an obvious relationship with aesthetic education, the broadly understood crafts, inscribed in the aesthetic context, require in-depth reflection. The purpose of the present article is therefore to demonstrate the issue of teaching crafts in elementary schools of the interwar period from the perspective of the idea of aesthetic education, based on the analysis of curricula, subject literature, and a query of selected specialist magazines.

1. Content, goals and methods of teaching crafts from the perspective of the idea of aesthetic education

The Polish elementary school had seven grades and was obligatory for all children aged 7 to 14. In the years 1918-1939 crafts had a permanent place in the curricula. In various periods of the interwar period, the subject included: crafts (sloyd, or handicrafts), female crafts, household classes, everyday culture classes, and horticulture and farming classes¹⁵. The curricula – the first from 1921¹⁶ and the second from 1934¹⁷ – provided for joint classes for girls and boys¹⁸. The exceptions were female crafts and household classes, which were conducted solely with girls. Studying crafts (handicrafts) up to and including

¹⁴ K. Dormus, *Rozwój form wychowania estetycznego i nauczania rysunku w Krakowie w latach 1850-1914*, Warszawa, IHN PAN, 1998, p. 8.

¹⁵ After the Jędrzejewicz reform, crafts were renamed to practical classes, which from now on covered: handicrafts, female crafts, household classes, everyday culture classes, gardening and farming classes.

¹⁶ *Program nauki w szkołach powszechnych siedmioklasowych. Roboty, roboty kobiece, gospodarstwo domowe*, Warszawa, 1921.

¹⁷ *Program nauki w publicznych szkołach powszechnych trzeciego stopnia z polskim językiem nauczania (Tymczasowy)*, Lwów, 1934.

¹⁸ The girls did not carry out the topics of the wood and metal sloyd provided for in grades 6 and 7.

the fifth grade was co-educational¹⁹. The number of hours spent on crafts ranged from 2 to 4 per week over the seven years of the full elementary school. According to the curricula the main teaching objectives of crafts included: training of the senses (primarily sight and touch), developing a sense of beauty, awakening and developing creative abilities, training of perseverance, independence, perceptiveness and accuracy at work, awakening the passion for physical work and developing respect for it, developing and enhancing mental and physical strength, familiarizing young people with the physical properties of materials and the use of basic tools in praxis, as well as the opportunity to put into practice the knowledge acquired during other classes – mathematics, physics, drawing, etc.²⁰

In the first three grades the crafts classes boiled down to the following issues: paperwork, straw and phloem (or raffia) works, and the making of Christmas decorations in the pre-Christmas period²¹. The degree of complexity of the exercises performed increased from year to year, ranging from simple cutouts and braids to sewing notebooks and weaving mats. In the fourth grade students worked with cardboard (the so-called cardboard sloyd) and composed cut-outs of coloured paper. In the last three grades, the boys learned woodworking based on the Swedish system²², and making simple everyday items, i.e. supports, labels, sticks, chopping boards, shelves, boxes, frames, and at the last stage of elementary school even teaching aids used during other lessons, e.g. in physics. The teacher's task was to pay special attention to care, accuracy and cleanliness during work, to avoid unnecessary decorations and to preserve the original character of the manufactured items and their utility values.

¹⁹ A detailed analysis of the content of the subject in different periods of the interwar period is presented in the article: A. Lisiecka, *Programy nauki zajęć praktycznych w Polsce międzywojennej*, «Studia Kulturowo-Edukacyjne», vol. XII, n. 1, 2017, pp. 75-87.

²⁰ *Program nauki w szkołach powszechnych siedmioklasowych. Roboty, roboty kobiece, gospodarstwo domowe*, Warszawa, 1921, p. 3.

²¹ In the third grade, paper work expanded to the work with cardboard.

²² The beginnings of the sloyd movement are manifested in the activities of the Finnish education reformer Uno Cygnaeus (1810-1888), who introduced practical classes to Finnish schools: weaving, wood and metal processing, molding in clay, paper molding, basket weaving and gardening. After returning to his native country, the Finnish-educated Swedish engineer Otto Salomon founded a sloyd seminar in Naas, which quickly became the European centre for the popularization of crafts at school. The Swedish system had an orderly form in terms of its didactic and methodology; built largely on the criticism of craft education. After the school reform of O.Salomon, Swedish craftsmen were replaced by qualified teachers, and the workshops and tools were adapted to the needs of students. O.Salomon associated his concept mainly with woodworking, which, in his opinion, had the greatest educational value. The students, following the teacher's strict instructions, independently produced the models required by the curriculum. The main purpose of teaching, however, was not the finished object, but the skills acquired during its construction. Aksel Mikkelsen created the Danish variation of sloyd. The adaptation of the Swedish system to the needs and conditions prevailing in our country was performed by Władysław Przanowski – the 1923-1937 headmaster of the State Institute of Crafts in Warsaw.

In his article entitled *Nowe drogi w nauczaniu robót ręcznych*, Jan Mazurek presented an interesting and original methodological proposal in the field of sloyd²³. The proposal was a response to the limitations of the Swedish method, observed by both theoreticians and active teachers. The creative (individual) method described by J. Mazurek aimed to eliminate the schematism that characterized the classic sloyd. The essence of the approach was to enable students to carry out their own projects, based on previous exercises, thus allowing for practical familiarization with the material and tools. The teacher's tasks were limited to planning the course of the lesson, preparing demonstrative models, accurately explaining the exercise, developing a technical drawing (if necessary several drawings with students, so that the pupils understand the purpose and result of their work), introducing possible corrections to students' projects and supervising the course of their individual work. The creative method raised some reservations, due to the numerous imperfections of the objects created during such classes (their variety, as well as difficulties in organizing work, etc.), however, this did not deter enthusiasts of the creative approach, who emphasized the great importance of freedom and independence in the mental development of young people.

The curricula repeatedly emphasized the general nature of teaching crafts. In the 1921 document we read:

Crafts classes at school should not be regarded as a play or merely craft, but as general education classes, developing both the soul and body of the child²⁴.

The basic pedagogical value of crafts classes was connected with the mental and physical activities accompanying work. The curricula also optimistically assumed that the introduction of crafts to public schools would, in the long term, contribute to the flourishing of Polish arts and crafts.

Care for the neat appearance of school rooms formed an important element of aesthetic education. In the discussed historical period, the child's immediate surroundings – home and school – considered in an aesthetic context, raised a number of doubts and criticisms. Elementary school students most often came from the poorest strata, and even the elementary schools themselves were underfunded, and even poor in rural regions. The vision of an ideal school space by Leokadia Motel, from her article *Nauczyciel krzewicielem kultury estetycznej*, published in the *Rysunek i Zajęcia Praktyczne* magazine seems to be as enchanting as it is utopian in this context:

²³ J. Mazurek, *Nowe drogi w nauczaniu robót ręcznych*, «Roboty Ręczne i Rysunki», n. 3, 1930, pp. 8-10.

²⁴ *Program nauki w szkołach powszechnych siedmioklasowych. Roboty, roboty kobiece, gospodarstwo domowe*, Warszawa, 1921, p. 7.

I can see a white, stylish palace with a nice, simple structure, surrounded by flower beds and a large park. Inside there are large classrooms, wide corridors, flowers, paintings, busts of heroes. It is clear, clean and beautiful. For seven years of attending this sunny school, the child will grow with order, cleanliness, beauty, and thus will be forced to pursue similar conditions outside school. But this is a picture of dreams called 'School in a hundred years'²⁵.

Despite difficult material conditions, efforts were made to decorate school interiors as much as possible; and the students actively participated in decorating classrooms, arranging the workshops and running the school garden. It was emphasized that:

Man should surround himself with selected things, chosen at every step, and this constant concern should be visible everywhere, and above all in his everyday environment [...]. Attitude to art should not be festive, demonstrated once in a while, but every single day and every step should show the desire to commune with art. This atmosphere of beauty is the essence of the individual's deep and true aesthetic culture²⁶.

Large-scale production of the so-called applied art and its general accessibility and the dominance of industrial over craft production, and thus, the displacement of handicrafts from the market for the benefit of affordable serial-made products, made it necessary to strengthen students' critical approach to mass production items, shaping their awareness and aesthetic taste, both in terms of clothing and interior design.

Machines could perfectly satisfy the desire of broad masses to create an environment and possess objects, which were previously a privilege of aristocratic classes. The industrialist sensitive to the needs of the market, reached for wonderful patterns made by professional artists and distorted them by introducing substitute cheap materials, as well as a new, foreign design, machine-made technique, leaving only some external, rather optical similarity²⁷.

In this context, various class aspects of the social role of art become apparent, and these were mentioned earlier by J. Ruskin and his student W. Morris.

The issue of proper organization and use of the school workshop was directly related to the problem of teaching crafts and interior design. This issue was broadly discussed in the specialist press. Władysław Przanowski – the long-time headmaster of the State Institute of Handwork in Warsaw, editor of the *Praca Ręczna w Szkole* magazine, and author of crafts curricula programs for general and teacher training seminars – wrote, in one of his numerous articles:

²⁵ L. Motel, *Nauczyciel krzewicielem kultury estetycznej*, «Rysunek i Zajęcia Praktyczne», nn. 7-8, 1936/7, p. 226.

²⁶ S. Machniewicz, *Estetyka życia codziennego. Zarysy estetyczne i zagadnienia sztuki współczesnej*, Lwów, Państwowe Wydawnictwo Książek Szkolnych, 1934, pp. 328-329.

²⁷ D. Bojarunas, *Sztuka czysta i sztuka stosowana*, «Praca Ręczna w Szkole», n. 4, 1928, pp. 20-21.

One of the tasks of crafts classes is to develop aesthetic culture among young people. The whole workshop equipment must serve this task by appropriate, tasteful, decoration of the walls with nice products of students and local people, clippings, frames, shelves with ceramics, etc. The workshop should be kept perfectly clean at all times. [...] By arousing disgust for dirt and worship for cleanliness among the young, we give them one of the most important foundations of education, not only aesthetic one²⁸.

The relationship between crafts, aesthetic education and art was discussed many times in the columns of *Praca Ręczna w Szkole*, in articles by Nina Bobieńska or Zygmunt Andrzejewski²⁹.

Striving for equal treatment of art and craft was reflected in W. Przanowski's article, in which he described one teacher teaching both subjects – drawings and crafts:

Under his care, young people work on artistic equipment and school decorations. He leads young people to exhibitions, museums, to workshops and factories. In a word, it is a man, who constantly watches over both the aesthetic and technical development of young people in his school. I am sure that such a combination of learning drawings and crafts in one hand would be in full agreement with newer views on art, and it would contribute significantly to eradicating the superstition, deeply rooted in our society, that only art and painting are of art in art. The painter and the Sloyd-man in one person, thanks to a special combination of the scope of his work, even despite his will, will inculcate in the minds of young people the great truth that beauty can manifest itself both in a picture, and in a chair, stool, gift box, carpet, apartment house, or barn. The sloyd-painter will reestablish a broken thread that used to link art and craft. He will open people's eyes to the fact that one can paint pictures and not be an artist, and that one can be an artist, even creating solely everyday objects³⁰.

Henryk Policht also wrote about the relationship between applied art and art in 1924:

Pure art usually strives for similarity with nature and usually deals with life issues (genre, historical and religious painting). On the other hand, decorative art, decorating utility objects, strives to create the necessary conditions that would evoke aesthetic feelings in us. Thus, it raises the value of the object to a higher level, i.e. to the value in use for the human spirit³¹.

²⁸ W. Przanowski, *Urządzenie wzorowej pracowni robót ręcznych w seminariach, szkołach średnich i powszechnych*, «Praca Ręczna w Szkole», nn. 2-3, 1927, p. 21.

²⁹ E.g.: D. Bojarunas, *Sztuka czysta i sztuka stosowana*, «Praca Ręczna w Szkole», n. 4, 1928, pp. 20-25; E. Frankowski, *Sukmany polskie*, «Praca Ręczna w Szkole», n. 2, 1928, pp. 42-51; N. Bobieńska, *Sztuka romańska w Polsce*, «Praca Ręczna w Szkole», n. 2, 1933, pp. 91-110; N. Bobieńska, *Wychowanie estetyczne młodzieży*, «Praca Ręczna w Szkole», n. 1, 1936, pp. 27-31; P.T. Pietrzykowski, *Zabytki sztuki kowalskiej i ślusarskiej na Starym Mieście w Warszawie*, «Praca Ręczna w Szkole», nn. 3-4, 1930, pp. 87-103; W. Szrajberówna, *Uwagi o sztuce ludowej*, «Praca Ręczna w Szkole», n. 2, 1928, pp. 24-42; Z. Andrzejewski, *Wartość sztuki ludowej*, «Praca Ręczna w Szkole», nn. 2-3, 1937, pp. 222-240.

³⁰ W. Przanowski, *Nauczyciele rysunków i nauczyciele robót*, «Praca Ręczna w Szkole», n. 4, 1927, pp. 7-8.

³¹ H. Policht, *Metodyczne nauczanie wycinanki*, Kraków, Author's edition, 1924, p. 20.

As examples of the appropriate combination of decoration with an object, H. Policht uses a folk kilim, book bindings and regional embroidery, indicating the role of a suitably (rhythmically and harmoniously) composed ornament that emphasizes their beauty and usability.

Composing decoration requires knowledge of the creation of an ornament and hence the development of a sense of beauty must be based on teaching ornamentation³².

The school programs emphasized the need to «bring beauty to classes by striving for noble proportions and harmony of colours³³, arousing recognition of «monuments of old native Polish art»³⁴ – in the overwhelming majority destroyed by warfare and displaced by items that were fashionable at that time, and emphasize the spirit of folk ornamentation, appropriate for the area, in which the school was located.

In the third grade of general school, girls began studying the so-called female crafts. Their goal was: to prepare students to independently perform easy and useful women's tasks, to awaken respect and a passion for manual work, to get used to order, economy and accuracy in performing any work, and to develop aesthetic taste.

The curriculum included sewing and decorating, crocheting and knitting, as well as patching and repairing damaged clothes. The degree of difficulty of work performed was steadily increasing year by year; ranging from simple designs (napkin, collar, purse) to the more complex ones (underwear, blouses, skirts). Women's crafts had a practical dimension, supplemented with some general education elements, i.e. developing in students care for cleanliness, saving money, and respect for work. Teaching of female crafts had to be adapted to the student's abilities and implemented using visual methods and collective forms. Individual works were selected according to the needs of the environment from which the students came. The classes provided an opportunity to talk about the origin and species of materials, manufacturing processes, as well as national and folk costumes and native ornamentation (of the region in question). It was up to the female crafts teacher to demonstrate their beauty, as compared to the tasteless factory rubbish. Undertaking such topics was to contribute to shaping of the aesthetic taste of schoolgirls. In 1924, Maria Rudzińska – the author of one of the few handbooks for female crafts at that time – wrote:

Getting to know folk patterns and caring to keep them from extinction is one of the duties of the village teacher. No one else has such easy access to them, so many opportunities to

³² *Ibid.*, p. 22.

³³ *Program nauki w szkołach powszechnych siedmioklasowych. Roboty, roboty kobiece, gospodarstwo domowe*, Warszawa, 1921, p. 11.

³⁴ *Ibid.*, p. 12.

buy originals or to copy and describe them. The village teacher should raise awareness that there is no such trivial detail that could be indifferent to the ethnography and history of Polish culture. And thus, by collecting folk patterns, either original or copied and described by themselves, the village teacher can greatly merit in relation to Polish science³⁵.

The so called household classes formed an alternative to sloyd crafts. Like sloyd, they were essentially based on physical work, of course different in form, but «aiming at same educational purpose: to strengthen the efficiency of spiritual strengths, to raise the dignity of crafts in the minds of children to the level of dignity of a school subject equal to subjects of purely mental education, to demonstrate that also in physical work intelligence should go hand in hand with knowledge, and that any physical work can become equivalent to mental work»³⁶. The aim of the study was: to provide the knowledge required for independent operation of a small household in a hygienic and economic way, instilling respect for homework by raising awareness of its social and cultural significance, and introducing students to order, punctuality and savings. The school curriculum included material for grades VI and VII. The content was divided into theoretical and practical. Theoretically they provided the students with the necessary knowledge (e.g. about the properties of chemical substances used in household chores, nutritious qualities of food products, health hazards resulting from lack of hygiene, etc.), while practical ones equipped them with specific skills: cooking, organizing, washing and ironing.

Zofia Żerańska dealt with the issues of household and everyday life culture classes extensively on the pages of the *Rysunek i Zajęcia Praktyczne* magazine. In one of her articles she wrote:

Household is one of those divisions of practical classes, whose inclusion in the program for elementary schools as a compulsory subject has become a necessity, resulting from understanding the needs of the family both in the city and in the rural areas. Raising the culture of home life by instilling in the schoolgirls – future housewives – the rules of hygiene in preparing meals, skillful organization of work, developing a sense of aesthetics in serving dishes and setting the table, a rational arrangement of menus from the point of view of nutritional and monetary value, calculating dishes, that is the short list of tasks of these classes in *life*. The program allocates two years of study to accomplish these tasks, while the number of hours depends on local conditions (in Warsaw schools it is three hours per week for each student). Although household classes are a compulsory subject, in many schools the organization of these lessons encounters almost insurmountable difficulties. They result from the lack of appropriate rooms, which must comply with special conditions for these classes³⁷.

³⁵ M. Rudzińska, *Roboty kobiece w szkole powszechnej: podręcznik dla nauczycielki*, Lwów, K.S. Jakubowski, 1924, p. 133.

³⁶ *Program nauki w szkołach powszechnych siedmioklasowych. Roboty, roboty kobiece, gospodarstwo domowe*, Warszawa, 1921, s. 28.

³⁷ Z. Żerańska, *Gospodarstwo domowe*, «Rysunek i Zajęcia Praktyczne», n. 1, 1934, p. 26.

Although from the current perspective, the legitimacy of conducting household classes at school in the form described above raises reasonable doubts – for example in the light of the postulates of feminist circles – in the interwar period such lessons were necessary and gave girls from the poorest strata the opportunity to acquire knowledge and skills that significantly contributed to the improvement of their quality of life. It should be remembered that the low cultural level of part of Polish society was the result of both the social structure itself and the consequence of many years of war and servitude.

The issue of hygiene was covered in the book *Pogadanki o higienie* by Janina Rauch-Sobolewska³⁸. The author presented, in an accessible way, hygiene regulations in force at school and at home, stressing the importance of cleanliness and the consequences of non-compliance, and raising the problem of physical activity, medical care provided at school and first aid. We find a more comprehensive discussion of the topic in *Higiena* by Kazimierz Zgórski³⁹.

After 1932, when the act reforming the school system came in force⁴⁰, new curricula were issued. In their light, practical classes, in addition to training intellectual and manual skills, were to contribute to a better knowledge and “love” of Polish culture, make students aware of its momentous role and strengthen ties of students with folk, regional and national traditions. It was recommended to use a greater number of aids, such as: paintings, illustrations, films, books and magazines, which, next to trips (or instead of them when it was impossible to organize them) would deepen the knowledge and positive emotional attitude of students towards art and physical work. Horticulture and farming activities were also included in the program.

As already mentioned, nature was one of the three carriers of beauty (next to art and the external environment), which was the first source of aesthetic impressions of the child. Already in 1900, in the journal *Szkoła* A. Gliński wrote:

Nature is the best school of aesthetics. Whoever first gets to know beauty in it, will acquire the rules by which he will be able to judge all other kinds of beauty. Its charms are so strong that children who are insensitive to the beauty of art already have a vivid impression of nature⁴¹.

According to, among others I. Moszczeńska a stroll through a flowery meadow developed child's aesthetic sense to a greater extent than browsing through albums of artistic engravings. In municipal schools, which lacked a garden and green spaces, potted plants were grown and bouquets were arranged,

³⁸ J. Rauch-Sobolewska, *Pogadanki o higienie*, Warszawa, Książnica Atlas, 1928.

³⁹ K. Zgórski, *Higiena. Podręcznik dla szkół powszechnych*, Lwów, 1930.

⁴⁰ Official Journal of Laws of Poland 1932, n. 38, item 389.

⁴¹ A. Gliński, *Z dziedziny estetyki wychowawczej*, «Szkoła», vol. XXXIII, n. 11, 1900, in M. Zalewska-Pawlak, *Rola sztuki w wychowaniu. Polska tradycja pedagogiczna*, Łódź, Wydawnictwo Uniwersytetu Łódzkiego, 2001, p. 41.

using and strengthening the students' natural sensitivity to the beauty of nature in its various forms and manifestations.

School gardens served as an additional workshop. Stanisław Przybyłowicz – an active teacher – wrote:

Similarly, as we create workshops for still life, we should create garden-workshops, where knowledge, acquired by observation and experience, the best means of developing a child's independence, will be worth a hundred times more than book knowledge. I used the term 'garden-workshop' to separate such a garden from among the many demonstration gardens in Poland. Even on a dozen or so square meters, you can create a workshop by choosing the right plants and exercises⁴².

Work in the garden-workshop lasted the entire calendar year; students were to move freely in it, carry out all work under the guidance of a teacher and keep notes. Trips to botanical gardens and natural ecosystems complemented these classes.

In the garden, children note down their observations and using magnifying glass and coloured pencils draw the course of experiments in their notebooks, fragments of plants or diagrams. The acquired knowledge is supplemented with children's literature⁴³.

During the holidays, students were able to visit the garden, track the changes taking place in it, and record them in their notebooks. Przybyłowicz also recommended entrusting students with individual tasks for training their independence:

Here is an example: in the second half of June, children receive tiger lily bulbils that grew at leaf axils. They are to plant them in a small pot or box at home, cultivate and keep a diary [...]. After the holidays they bring small plants and the diary. It is difficult to describe how much fun is there in the class, comparisons, admiration, and how much embarrassment for those, who did not do the work or did it carelessly⁴⁴.

According to S. Przybyłowicz, learning in the garden-workshop was to be carried out based on: direct observation, research and experience, independence in reaching knowledge and conclusions, and experimental explanation of natural phenomena. Nature provided children with intellectual, sensual and inspiration impressions, it was a space for learning and an inexhaustible source of models for drawing classes.

⁴² S. Przybyłowicz, *Ogród-pracownia. Doświadczenia i obserwacje przyrodnicze na niższym poziomie nauczania*, Warszawa, Nasza Księgarnia, 1931, p. 6.

⁴³ *Ibid.*, pp. 7-8.

⁴⁴ *Ibid.*, pp. 8-9.

Conclusion

The issue of aesthetic education first appeared in pedagogical thought of the second half of the 19th century, in the result of profound social, cultural and educational changes. The development of currents in socially engaged aesthetics, the progressive education movement and experimental psychology, as well as the philosophy of scientism and modernist interest in art have all contributed to the recognition of aesthetic education as a permanent element of humanistic education. In addition, in the face of new industrial reality, it became necessary to bridge social inequalities in terms of access to cultural and art goods. The Ruskin idea of making the proletariat's life beautiful again became actual, which in practice meant a thorough reconstruction of social and economic relations. It was assumed that the external beauty the children interacted with – the beauty of nature, the beauty of works of art, and the beauty of orderly and neat interiors – is *a sine qua non* condition for the existence of internal beauty in their lives, the basis for shaping their broadly understood aesthetic sensitivity.

In the conditions of Polish elementary schools, aesthetic education took place in two dimensions: individual and social, with much more attention being paid to its social dimension. Aesthetic education was carried out primarily in drawing, singing and crafts classes. The last of these included: crafts (sloyd or handicrafts), female crafts, household classes, everyday culture classes, and horticulture and farming classes. Teaching crafts was supposed to support the intellectual, physical and manual development of children, shape their positive attitude to work and proper habits in the arrangement of their immediate environment. Through direct contact with nature and art – including the applied art – children were introduced to the world of aesthetic beauty, thus contributing to a real improvement in the quality of their life.

Follow-up file for studying the material and spiritual status of students (1920)*

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ABSTRACT: Since taken base on of constructivist theory in education programs in our country, it has become important to know the student and to take into account the individual differences during the preparation of teaching processes within the framework of student-centered education. At this point, what has been done about the follow up of student development in our educational history has been investigated. The related resources has been examined and so finding a development file was prepared in 1920 to follow the development of the student. In this study, the file published under the name of Guide of research on the Material and Spiritual Status of Children Attending Schools will be examined. The study is a qualitative research conducted by document analysis method. By descriptive analysis of the content of the file, it was aimed to reveal the criteria according to which the development of the students was followed during the periods of classical education. When the content of the student development file is examined, it is understood that it is important to follow the moral and spiritual development of the student rather than academic success. In order to get to know the student, it has been seen that emphasized the products produced by the student and the changes that occur in that student and the effects of a product or activity on the material and spiritual existence of the student. This study, which can be used as a basis for the comparison of today's educational approaches with the past, will contribute to the foundation of our educational approaches.

EET/TEE KEYWORDS: History of education; Students; Personal Development; Turkey; XXth Century.

Introduction

With the preparation and implementation of educational programs in accordance with the constructivist approach, it has been seen that significant changes have occurred in the education-training processes. The studies

* This study is an extended version of the paper presented at the 6th *International History Education Symposium* held on 10-12 October 2019 in Bolu/Turkey.

conducted in the field of education focused on learning-teaching processes that gained importance with the constructivist approach, evaluation of the process rather than the product, and student-centered educational environments¹. With these issues gaining importance, it has become necessary to develop new understanding about recognizing the individual / student, which is one of the most important points of education. Yeşilyaprak² has been state that the most important aim of education is «to make the individual beneficial to the society». It is a very comprehensive process for the individual to become beneficial to society. In this case, the importance of proper shaping of all processes that the student undergoes in the educational environment, especially teacher-student relationship and communication, increases³.

It would be a correct approach to directly relate the recognition of the student to the teaching competencies. It has also necessary to state correctly in which points the teacher should recognize the student in order to ensure that the competence of recognizing the student is within the scope of the specific competencies of the teaching profession. According to Şahin and Beydoğan⁴ the main topics that need to be addressed in order to get to know the student; family and family relations, socio-economic status, physical and health development, mental and language development, social and emotional development, school education and success, out-of-school activities and work experience, interests, future plans and professional tendencies. Considering that the information mentioned here covers the whole life of the student, the importance of keeping this information regularly in order to achieve the desired objectives of education increases. In this context, the constructivist approach, which is the basic philosophical point of view in the preparation of educational programs in our country, has a structure that will contribute to the teachers in terms of the competence to recognize the student.

When the first-hand sources of Turkish education history are examined, it is seen that there have been large-scale changes in traditional education approaches as a result of westernization movements especially in the 19th century. Since the 2nd Constitutional Monarchy Period, an educational system based on modern education has been tried to be established. The steps taken during these periods had been the set ground for the newly created education system in the republic period⁵. When the National Struggle Period education is

¹ İ. Yurdabakan, *Yapılandırmacı Kuramın Değerlendirmeye Bakışı: Eğitimde Alternatif Değerlendirme Yöntemleri*, «Ankara Üniversitesi Eğitim Bilimleri Fakültesi Dergisi», vol. 44, n. 1, 2011, p. 56.

² B. Yeşilyaprak, *Eğitimde Rehberlik Hizmetleri*, Ankara, Nobel Yayıncılık, 2000.

³ V. Aktepe, *Eğitimde Bireyi Tanımanın Önemi*, «Gazi Üniversitesi Kırşehir Üniversitesi Eğitim Fakültesi», vol. 6, n. 2, 2005, pp. 15-24.

⁴ C. Şahin, Ö.H. Beydoğan, *Öğretmenlerin Öğrencileri Tanıma Yeterliliği Ölçeği: Geçerlilik ve Güvenirlilik Çalışması*, «21. Yüzyılda Eğitim ve Toplum», vol. 5, n. 14, 2016, pp. 177-198.

⁵ Y. Akyüz, *Türk Eğitim Tarihi*, Ankara, Pegem A Yayıncılık, 2019.

examined, it is understood that efforts were made for the continuation of the training activities even during the most fervent periods of the war. Darulfünun is the highest institution in education of this period. Having gained “scientific autonomy” with the 1919 Regulation, Darulfünun, especially the Faculty of Literature, put signature under the important success in the complicated environment. As a result of the administrative and scientific autonomy gained by the 1919 Regulation, it was observed that new formations were realized within the Faculty of Literature, and new regulations were made in darulmesai (institutes) and departments. During these arrangements, the School and Education Museum, which was established by İsmail Hakkı Bey as a part of the Education Institute, made significant initiatives in terms of Turkish educational history. Selçuk stated the aims of this institution as follows⁶:

The purpose and duties of the School and Education Museum, which was opened in order to collect and render internal information about education in the country, to royalty and to help with the studies about education, can be explained as follows: To collect information and documents on the subjects such as buildings, plans and educational activities of the schools, all the education and training activities, the works showing the moral, physical and intellectual conditions of the students, statistics, punishment and reward procedures in schools, knowledge of attendance and absenteeism and also to publish guide books from the collected materials. In addition, it is among the founding aims of the museum to record and identify the maps of education of the country, to compile photographs of the students of various cities, to exhibit examples of handicrafts made by the students and to bring all kinds of works written about training and education to the museum library.

It has been understood that the School and Education museum continued its activities until 1933 and it was closed after İsmail Hakkı Bey from left Darulfünun⁷.

It has been found during the researches that the museum published a series of publications under the name of Inspection Guides in accordance with the purpose of establishment and sent to schools for filling. When the first work prepared by the School and Education Museum was examined, it has been thought that it had important enough to be the subject of this study.

1.1. Purpose of the Research

When the contents of this booklet which title *Follow-up File for Studying the Material and Spiritual Status of Students* were examined, it was understood that very important points regarding the follow-up of the individual development

⁶ M. Selçuk, *İstanbul Darülfünunu Edebiyat Fakültesi*, Ankara, Atatürk Araştırma Merkezi, 2012.

⁷ *Ibid.*, pp. 248-249.

of the student were mentioned. For this reason, it has been aimed to contribute to today's understanding of education and especially to student recognition activities by considering the content of this text. The fact that the importance of following the individual development of the student was reached in the 1920s and taking initiatives in this regard adds importance to the study. In addition to the content of the text examined, the detailed explanations of what teachers should pay attention to when filling this guideline increases both the quality of this guideline and the importance of this study.

2. Method

2.1. Research Model

This is a qualitative research by document analysis which is based on the examination of the report of the examination of the material and spiritual conditions of children attending schools in 1920 published. The study examined is the first guide of a series of studies called Inspection Guides published by the School and Education Museum in 1336. This guide, prepared as 20 pages, was designed to be filled in by teachers. The guide is designed to be completed separately for each student. The Ottoman text first has been translated into modern Turkish and after simplified and analyzed. This work has been accessed from the archives of Istanbul Metropolitan Municipality Atatürk Library.

2.2. Data Analysis

Descriptive analysis method was used in the analysis of the text examined in the study. The content of the text is classified according to the original chapters and the similarities and differences in the context of today's educational approaches are discussed in the findings section.

3. Findings and Discussion

3.1. Monitoring of Physical and Spiritual Development of Students

On the first page of the text, there is organized an area where the child's photo will be affixed and a section under which information about the school,

class, number, age and name will be written. When look at the second page, it has been seen a table under the title (*Ahval-i cismaniyye ve ruhiyye tetkikatı*) Inspection of Body and Spiritual Status. In this table, the physical characteristics of the child's has been inquired about «name, date and place of birth, nation, father's name, father's art and civil service, parent's education degree, power and mobility, appearance, body strength, memory, head circumference width, width of the shoulders, height, weight, information on the degrees of breathing and family environment».

The informations requested about the child's mental development is: «humor, pleasure, cleanliness, language, is the child intelligent? Or humble? Is the unseen or the fool? And why?, Is there any reason that affects his attitude and behaviour? Reasoning, attention, character, creativity and inventive ability, ability to imitate information». This information will be observed by the teacher and will be recorded on a regular basis throughout the year. When the information given here is examined within the framework of today's educational approaches, the measurable characteristics of the student determined by Özgüven in terms of recognizing the student are classified as follows⁸:

1. Body measurements
2. Physiological measures
3. Motor capabilities
4. Emotional and perceptual properties
5. Mental abilities
6. Knowledge and skills
7. Special abilities
8. Interest, attitude, value, beliefs and ideas
9. Personal characteristics.

It is seen that these characteristics, which are determined to be measurable, largely correspond to the information requested in the examined guide. Body measurements (height, weight, head circumference, width of shoulders, appearance), physiological measurements (breathing capacity), motor abilities (strength and mobility), mental abilities (intelligence, modesty, unseen or fool, Factors affecting intelligent, reasoning ability, attention), special abilities (creativity and inventiveness ability, imitation ability, humor susceptibility), personal characteristics (pleasure, susceptibility to cleanliness, attitude and behavior) has been asked observe from the student and record this information.

Of course the most important point here is the explanations given to the teacher; in this section, what the teacher should pay attention to, how the student should be monitored detailed explanations has been given.

⁸ İ.E. Özgüven, *Bireyi Tanıma Teknikleri*, Ankara, Nobel Yayıncılık, 2012, pp. 12-14.

It will be useful to mention the most important points in these explanations. The first of these concerns the determination of whether the child is intelligent or modest in relation to the child's mental development. In this regard, it is stated that they are the ones who show the ability to make additions and inventions from themselves and do not do the same task to distinguish smart children from others, and those who are modest can be identified as those who do not make an extraordinary effort but make ordinary reasoning and comparisons. In making the distinction between the unseen and stupid students, it is stated that they are devoid of reasoning and at the same time are able to repeat the ideas and duties given to them in the same and hard way, and that the idiot and foolish ones cannot show any intellectual ability. In this type of children, it was requested to state also whether there are various external effects such as illness or poverty affecting their intelligence or physical deficiencies. It has been expected that the determinations related to memory would be categorized as sufficient, irrelevant, good, modest, extraordinary. In the explanations made for the determination of children's discernment, a classification which is agile, slow moving, stagnant, lost, attention-oriented, constant, non-constant is determined. The characteristics to be considered in evaluations about the character of the child are determined as active, cheerful, sad, careless, embarrassed, coward, brave, free, entrepreneur, liar, haughty, deceitful, dishonest, correct, brave. It is stated that the child's ability to invent and imitate can be understood from the works of the child during his teaching life and his humor ability can be understood from his humorous predisposition in private life. It has been state that the pleasure levels of children can be understood by considering their disposition to dresses, books and notebooks, and their cleanliness in their lifestyles and that the determinations related to this should be recorded using appropriate adjectives. The students has been expected to be described in terms of arithmetic, literary, poet, craftsman, medical practitioner, and their speaking style is noisy, manly, full, serial, stagnant, stuttering, dumb, dumb, and pronunciation errors. Teaching capability of the students has been expected to be described in terms of arithmetic, literary, poet, craftsman, medical practitioner, and their speaking style has been expected to be described like as noisy, manly, full, serial, stagnant, stuttering, dumb and pronunciation errors. The teacher has been asked to determine the appearance of the children, and for this, robust, elegant, sweet, beautiful, decent, ugly, curly hair, blonde, brown-haired, brunette, black, and appropriate ones has been asked to record. Physical strengths of the students has been expressed with adjectives like as weak, strong, moderate state.

When the explanations made about the points that teachers will pay attention during the determination of the physical characteristics of the students are examined, it is understood that these sections are shaped according to the conditions of the period. When measuring the circumference of the head of the children, it has been stated that the part with the largest circle diameter

should be measured from the top of the head and from the upper edges of the ears and if there were no special tools to measure it, it could be measuring tape and expressed in numbers. It was stated that the distance between the two shoulder heads should be taken into consideration when measuring the width of the shoulders and that the measurement can be made with the tailor tape measure. It was requested to be recorded in the measurements of the height and weight of the child. It was also desirable to measure the degree of breathing and exhalation of children. It has been stated that this measurement can be done separately by measuring the chest width with centimeter strip while the child is breathing and it should be written in the relevant section with numbers.

Observations about the child's family and the environment in which they live are explained. Regarding the family of the child, it has been stated that points such as whether they are rich, poor, the neighborhood where they live are crowded, whether they are secluded, if their have relatives and relatives live too, ascetic or if they live together, if the child is in contact with many people. It has been stated that to what extent these points affect the child's material and moral, private and general life should be determined and written accordingly.

3.2. Monitoring of Students Awards and Punishments

The second part of the study guide about to information about the awards and punishments the child receives during his / her education. In this section, the sections in which the total values of the awards and punishments received within a month and a year will be recorded and explanations are given in the table. The terms of the awards and punishments given in this section are expressed with the concepts of reward and punishment used in the education system of that period. *Well done* (Aferin), *Tahsin*, *Concession* (İmtiyaz) for the award, *Tevbih*, *Registration* (Tescil), *Tekdir-i Aleni*, *Tard-ı Muvakkat*, are the expressions used for punishment. In the related section, if any other award or punishment was given, it was requested to be stated in a separate section. It is understood that the awards and punishment classifications given here are similar to those given in the Absolutism Period (1876-1878) specified by Akyüz⁹. In this period, the punishments given to the students to ensure discipline, *ihbar ve tenbih*, *tekdir*, *tevkif*, *alenen tekdir*, *ihbar ve şikayet*, *ihrac-ı muvakkat*, *ihrac-ı kati*, rewards are *aferin*, *tahsin*, *tahsiname*, *imtiyaz*, *levha-i iftihar*, *mükafat* as classified. The award and punishment classifications included in this guide were also of similar characteristics. The concepts of reward and punishment has been consider as very important concepts in the period of educational process that time. Educators of the period is the opinion that if the awards and punishments

⁹ Akyüz, *Türk Eğitim Tarihi*, cit.

determined as the main element of the discipline has not been provide to the student and in the school environment, there will be a weakness in the discipline. By Süleyman Paşazade has been emphasized that the award and punishment are the educational tools that an educator cannot give up, and that it is important to pay prizes according to the children's degree of study and to pay attention to injustice. He has been stated in his works that students should not only be evaluated in terms of lessons work, but should be rewarded in their moral, decent, state and movement proper students¹⁰. The section considered to be important in the award and punishment section of the guideline was to ask for an explanation of how the child perceives the reward or punishment. The teacher was asked to answer the following questions: What impact does the reward or punishment have on the child? What are the reasons why the child is not responsible? In addition, the teacher has been asked to express what student considered remarkable about past, present and future rewards and punishments. It is also remarkable in the explanations made for the relevant section. It was stated that during the registration of awards and punishments, especially the awards and punishments given by the administration or teacher should be written. These; stand on one foot, hanging plates on his chest, get out of class, beating, giving books and food, punishing or honoring to the verbally with honor or strokes. Such rewards or punishments were requested to be written in the explanations section together with their reasons. In the lower part, the following questions should be taken into consideration in the explanations about how the child perceives the reward or punishment: The child thinks that they are applying this reward or punishment to him why? What do the child think about it is good or bad, reasond or reasonless, correct and wrong? The following explanations has been required in the sections related to the effect of the reward or punishment:

- whether the child performs his or her duties under the influence of these awards or penalties,
- whether the reward or punishment pampers the child,
- whether it provokes its honor,
- whether he had a rebellion or had a sluggish.

In addition, the teacher's attitudes towards the child like as nervous, gentleness, favorable, careless, threatening effects on the child, effects of teacher's teaching methods on children, such situations do not encourage the child to work, such as explanations were asked. Mustafa Satı Bey, one of the pioneers of modern education in the Ottoman Empire, pointed out that the issue of discipline, success and failure is a matter of conscience and also that

¹⁰ H. Altın, *Osmanlı Pedagoglarında disiplin, Ödül ve Ceza Fikirlerine Dair Örnekler*, «A.Ü. Türkiyat Araştırmaları Enstitüsü Dergisi», vol. 57, 2016, pp. 1869-1884.

the educator should be aware of this situation. According to Satı Bey, teacher's voice, state and movements and even the order of the class affect the success or failure of the student¹¹. It is possible to see the reflections of this idea of Satı Bey in the explanations section prepared for the section about awards and punishments in the examined guide. As a third point, it has been asked to pay attention and explanation to the points such as whether the parent has an effect on the industriousness of the child, whether the child's home environment and wealth is suitable for working at night, and whether there is a shortage of food, light, time and space. Such a detailed determination of awards and punishments is very important in terms of determining the effectiveness of the awards and punishments given during the training and it is a suitable with today's educational approaches. Today, in the approach of educators to the concept of discipline, the concepts of helping children learn to take responsibility, self-control and respecting the personalities of children are emphasized. The aim of the discipline is to give the child the ability to control and evaluate his / her own behavior. In this context, it is seen that the meaning of the discipline concept has been brought to the forefront rather than the concepts of reward and punishment¹². When we compare the current understanding with the guide examined, it is understood that the concepts of reward and punishment are considered as a part of the education process in that period, in the explanations made in the related section, attention is paid to the way these concepts are applied and the effects it has had on the student are expected to be observed.

3.3. *Monitoring of Students' Attendance*

The next section of this guide is devoted to students' attendance and absenteeism information. Monthly months, a table created for writing this information has been asked to explain the distance between the child's home and school, reasons for attendance and absenteeism, whether the child had to work outside the school or not. The issues to be considered while making these explanations are stated as follows; the distance from the child's home to the school will be written approximately in hours or meters, reasons for continuity and absenteeism, illness, daily occupation, have not parent, seasonal opposition, multiplicity of school tasks, the child's habit of attendance, that is, the child's conversation and hatred towards school, will

¹¹ *Ibid.*, p. 1874.

¹² Ş. Özen Altınkaynak, H. Uysal Bayrak, N. Taşkın, B. Akman, *Çocukların Ödül ve Ceza Algıları ile Öğretmenlerin Disiplin Hakkındaki Görüşleri*, «Dicle Üniversitesi Ziya Gökalp Eğitim Fakültesi Dergisi», vol. 33, 2018, pp. 1-12; M. Tekke, B. Özer, E. Taş, *Türkiye'de sınıf içi eğitimde Cezanın Etkisi: Disiplin Kurallarının Bilimsel Uygulanması*, «Disiplinlerarası Eğitim Araştırmaları Dergisi», vol. 2, n. 4, 2018, pp. 19-27.

be written explaining moral and non-moral reasons, at the same time the child is working outside for what reason, what is it working, what benefit awaits this occupation, that is, it should be clearly written to help the poor parent or to learn the art of the parent.

3.4. *Monitoring of important events related to students*

The fourth section of the guidance guide is devoted to identifying and explaining some important cases that are not possible to be explained in the first three chapters, but which are of great importance to the child's material and spiritual life. The name and duty of the person observing this case, the date of the case observation, the date the case was recorded in the directory and the explanations are included in this chapter. Also in relation to the details of the case were asked answers to follows questions; Does the observed case require the child to use special abilities such as strength, agility, speed, attention, thinking? Whether the case was chosen by the child herself/himself or proposed by someone else or as a task, if so, who is it? Did the case be appreciated by the parent, teacher or other children following him / her? Is there any reward or punishment as a result of this case? If so, what kind? Who has been offered or promised? Is the case at least arousing a simple personality? What is the condition of the other affected children during the case? What is the status of children who are not affected? How is the child making the case at the end of the case? Do the results of this case depend on chance? When the explanations made about this part are examined, the reason for this part is stated as being able to examine the movement caused by a movement made deliberately by the children, as well as the movement of the children themselves. However, during the recording of the events, it has been state that the sensation or nothing hypothetical was confused and the importance of transferring the event as it is.

One of the most important reasons for recognizing the individual within the framework of today's educational approaches is to reveal the differences between individuals and to contribute to the development of these differences in terms of features. In the process of recognizing and evaluating children, it is necessary to make a meaningful decision-making process by systematically collecting, recording and evaluating all the information about children by making use of various tools in a consistent and objective manner. This situation is considered as the cornerstone of preparing suitable educational environments for children¹³.

¹³ G. Yılmaz Topuz, Ö.M. Erbil Kaya, *Okulöncesi Eğitim Öğretmenlerinin Çocukları Tanıma ve Değerlendirme Amaçlı Yapılan Çalışmalara İlişkin Görüşleri*, «Anadolu Journal of Education Sciences International», vol. 6, n. 1, 2016, pp. 27-62.

3.5. Follow-up of the Works of the Students

The last part of the guide has been prepared for the works of the child. In the explanations about this part, it has been stated that the works meant by the child are the tasks such as paintings, fine writing works, doodles, letters, handwriting, handcrafts which are specially made by the child both at school and at home. They were requested to be pasted into the blank pages left in the guide, and if more products were put out, it could be prepared as a separate file. However, the most important point to be considered is that these works are not specially prepared for this file. The aim is to have the child's natural works. It is stated that the works made for the guide and arranged by the adults do not matter. When the works requested in this section and the explanations about it are examined, it is understood that they are similar to the portfolio / student product file that is commonly used today. While the aim of the guide is to recognize the student in all aspects and to follow her/his personal development, the fact that the purpose of evaluating the success of the student in today's portfolio files has come to the forefront is the most important difference between this guide and today's applications¹⁴. In this guide, it is understood that the main purpose of the collection of student products is to know the student. It is possible to understand this purpose from the explanations about the qualifications of the student products to be collected. The most striking thing in these explanations is that the products are pointed out to be the works that the student reveals spontaneously in the process and that the products that are specially prepared to be put into the file are abstained. In addition, the products should be prepared by the students themselves, in other words, not to the help and contribution of the elders should be considered as a point of particular attention. In the studies conducted to prepare a student follow-up file consisting of the students' own studies, the advantages and limitations of this process were evaluated. When these evaluations are taken into consideration, it is seen that the most emphasized issue among the limitations is the selection of the products included in the file. At this point, it is emphasized that the student should choose the products that he / she created without any help from anyone¹⁵.

At the end of the guide, it is seen that a section where personal and professional information about the person preparing this guide is requested.

¹⁴ Y. Şenol, C.O. Güzeller, *Ölçme Değerlendirmede Bir Yöntem: Portfolyo*, «Tıp Eğitimi Dünyası», vol. 26, 2007, pp. 41-49; Yurdabakan, *Yapılandırma Kuramın Değerlendirmeye Bakışı: Eğitimde Alternatif Değerlendirme Yöntemleri*, cit.

¹⁵ S. Kilmen, *Öğrenme Serüveninin İzlenmesinde Ürün Seçki Dosyalarının (Portfolio) Kullanımı*, «Sosyal Bilimler Enstitüsü Dergisi», vol. 1, n. 16, 2008, pp. 156-170; M. Demirören, A.M. Aytuğ Koşan, Ö. Palaoğlu, *Bir Öğrenme ve Değerlendirme Yöntemi Olarak "Portfolyo"*, «Ankara Üniversitesi Tıp Fakültesi Mecmuası», vol. 62, n. 1, 2009, pp. 19-24; A. Kan, *Portfolyo Değerlendirme*, «Hacettepe Üniversitesi Eğitim Fakültesi Dergisi», vol. 32, 2007, pp. 133-144.

It would be appropriate to interpret the creation of this section as intended to determine whether the guideline was filled by the right people.

Conclusion

Today's studies show that the importance of recognizing the individual increases in the educational process within the framework of modern educational approaches. Increasing the efforts of teachers to get to know the student will contribute to their success in education and training, highlighting individual differences and thus making educational activities according to individual differences¹⁶. The importance of concepts such as active learning, learning to learn, questioning one's own learning and self-evaluation has increased with the introduction of constructivist approach-based education programs. Considering the fact that the study guide examined in this study has been prepared 100 years before today and it is understood that it has a quality that will form the basis of today's approaches.

When the applications made in the Ministry of National Education are examined, it is seen that this kind of student follow-up file is kept for each student under the name of "Student File" for many years. It is seen that the application process of this file is stated in The Regulation of Primary Education Institutions and this application is removed from the physical environment with the changes made. When the amendments made to the Regulation on Primary Education Institutions published by the Ministry of National Education are examined, the Student File is regulated by article 23 in the 2003 regulation. In this article, a file will be kept for each student and this file will include the student's registration and change of school documents, correspondence with his / her parents, and necessary records related to guidance. Confidential documents and non-objective opinions will not be included¹⁷. With the amendment made in the related regulation in 2008, it is stated that a student development file will be kept for each student in the e-school system with the name of Student Development File and this file will not be processed with non-pedagogical and confidential information¹⁸. With this amendment, the physical retention of the student files was terminated and the e-school system started to keep the files. However, in this system, which data will not be explained in detail. When a sample of the student files physically kept by teachers in schools until 2008

¹⁶ Aktepe, *Eğitimde Bireyi Tanımının Önemi*, cit.

¹⁷ MoNE, *Milli Eğitim Bakanlığı İlköğretim Kurumları Yönetmeliğinde Değişiklik Yapılmasına Dair Yönetmelik*, «Resmi Gazete», sayı 2521227, August 2003.

¹⁸ MoNE, *Milli Eğitim Bakanlığı İlköğretim Kurumları Yönetmeliğinde Değişiklik Yapılmasına Dair Yönetmelik*, «Resmi Gazete», sayı 27090, December 2008.

(Annex-1) is examined, it is understood that the content of this file is very similar to the file examined in the study.

One of the most important results of this study is that it is important to recognize the students in the periods that are thought to be the periods of the traditional teaching approach and to realize that studies are conducted to follow the learning processes. Another important conclusion reached by the study is the aim of preparation of the examination guide. The guide was prepared for the purpose of mapping and collecting the data of education the whole country at that time. When considered in this context, it is understood that the data were collected in order to determine the current situation in education and to make the necessary changes to complete the deficiencies based on the collected data.

In the researches, no data has been reached on whether the examination guide has been applied yet. It is understood that very rich and rare artifacts were collected in the School and Education Museum which was opened within the structure of Darülfünun, but the museum was closed with the closure of the Darülfünun in 1933¹⁹. Baltacıoğlu explained what happened the works collected here after the museum was closed with the following words:

This species is very rich in these documents and an unprecedented museums and libraries in Turkey, was eliminated immediately after removal from my Darülfünun. [...] As for the rich and irreplaceable accumulation of the Museum of Education, I learned about it this summer when I was in the Reading Books Commission in Ankara: Now it's in sacks in the attic of the university building²⁰.

As it can be understood from these statements, a very important corpus was created in the museum but could not be preserved.

When the contents of the examination guide inspected in this study are examined, it is understood that the period in which it was published is a very valuable work related to the educational approach and approach to the student. It is seen that the content of the work supports modern understanding of education. In this sense, it is thought that it will make an important contribution to the foundation of today's education concept. It is understood that the importance of giving importance to the education process and the individual follow-up of the students on the achievement of the students was aware of the time and efforts were made to improve it.

¹⁹ Selçuk, *İstanbul Darülfünunu Edebiyat Fakültesi*, cit., p. 249.

²⁰ İ.H. Baltacıoğlu, *Hayatım*, Yayına Haz. Ali Y. Baltacıoğlu. İstanbul, Dünya Yayıncılık, 1998.

Educación en la igualdad y la diversidad a través de la literatura infantil y juvenil. Microestudio sobre las categorías de género, etnia y edad en tres obras norteamericanas

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Educate in equality and diversity through children's and youth literature. Micro-study on the categories of gender, ethnicity and age in three North American works

ABSTRACT: The school library presents a good opportunity to educate students as informed young readers on issues of gender equality, the concept of ethnicity and attitudes towards age, creating a space where they can negotiate their own feelings and beliefs. In this microstudy, based on specific criteria, three children's and youth books published in the United States in the past three decades are examined: an illustrated book, a short chapter book, and a novel for young adults. While these texts are considered to be representative samples, the current research is not intended to be an exhaustive study, but rather an exploratory investigation of the educational potential of literature in three areas of interest considered essential in early education, with a postmodern methodology and a theoretical framework that serves as a starting point to apply to larger samples.

EET/TEE KEYWORDS: Education; History of children's and youth literature; Equality; Diversity; Gender; Ethnicity and age; North-America; XXth-XXIst Centuries.

Introducción

Según el Centro Nacional de Innovación e Investigación Educativa, «La biblioteca escolar es un centro de recursos de lectura, información y aprendizaje

que debe adaptarse [y] [...] cuyo eje transversal es la igualdad de género [...]»¹. La igualdad de género y la inclusión de la diversidad étnica y la edad en España son temas polifacéticos que inspiran emociones y creencias apasionadas. Polémicas como los usos del lenguaje, las definiciones de géneros, las legislaciones igualitarias y las representaciones étnicas y generacionales dentro de la sociedad están muy presentes en el discurso cotidiano actual. La biblioteca escolar puede servir como un lugar seguro donde los lectores jóvenes pueden negociar sus propios sentimientos y creencias sobre la igualdad de género y los conceptos de etnia² y las actitudes hacia la edad³. A través de la lectura variada se encontrarán muestras de lectura de ficción, y evidencia de que existe una gran diversidad entre las personas en las áreas de igualdad e inclusión manifestadas en cada aspecto de la vida, contraponiendo tendencias monolíticas. Tarana Burke, feminista afroamericana neoyorquina, quien fundó el movimiento #MeToo y fue nombrada por la revista *Time* como una de las personas del año 2017, afirma que «la realidad de los feminismos es múltiple, diversa, contradictoria a veces e interseccional. Esto quiere decir que son muchos los colectivos y las luchas que confluyen bajo el trabajo infatigable por la igualdad»⁴. Como tal, podemos buscar fuentes literarias para obtener información, definiciones extendidas o interrogatorios de las preocupaciones sociales, emocionales y personales de las mujeres, adolescentes y niñas modernas. En este caso nos centramos en obras de la literatura infantil y juvenil (LIJ) presentes en bibliotecas escolares americanas⁵.

¹ El Centro Nacional de Innovación e Investigación Educativa es una unidad gubernamental de asesoramiento educativo dependiente del Ministerio de Educación, Cultura y Deporte de España. Se encarga de programas de lengua, investigaciones sociales y promociones de igualdad e inclusividad. Véase Centro Nacional de Innovación e Investigación Educativa, Ministerio de Educación y Formación Profesional - Gobierno de España, Bibliotecas escolares, <<https://www.educacionyfp.gob.es/educacion/mc/cniie/alfabetizaciones-multiples/programas/bibliotecas-escolares.html>> (last access: 21.02.2020).

² Los conceptos aquí tratados emergieron como categorías de análisis en el campo de emigración femenina a principios del siglo XXI, G. Campani, *Genere, etnia e classe. Migrazioni al femminile tra esclusione e identità*, Firenze, Ets, 2000. Campani es, además, autora de otros libros sobre la interculturalidad y la globalización, siempre en clave del género: G. Campani (coord.), *Genere e globalizzazione*, Firenze, Ets, 2010 y Ead., *Peregrinazioni di una maga bambina. Raccontare l'interculturalità*, Firenze, Ets, 2012.

³ Los marcadores de edad y su influencia entre las relaciones sociales y en el individuo se entienden en este análisis como construcciones tanto performativas y metafóricas como biológicas. A. Wohlmann, *Green Medicine: Ecofeminist Readings of Women's Medication Narratives*, in J. Heil, A. Thiemann (edd.), *Controlling Bodies, Constructing Minds: (Post-)Feminist Identity Politics in the Biomedical Age* (Accepted/In press).

⁴ Véase A. Correa, *En 2019. El feminismo será interseccional (o no será)*, Last updated: 01.02.2019, <<https://www.vogue.es/living/articulos/que-es-feminismo-interseccional-transfeminismo-diversidad/38769>> (last access: 21.02.2020).

⁵ Hay varias editoriales de la literatura infantil y juvenil, por ejemplo, *Scholastic*, Last updated: unavailable, <<https://shop.scholastic.com/teachers-e-commerce/teacher/shops/ready-to-go-classroom-libraries.html>> (last access: 21.02.2020), *Penguin*, Last updated: unavailable, <<https://www.penguin.com/school-library/>> (last access: 21.02.2020) y *Usborne*, Last updated:

Nodelman⁶ citó a Bakhtin al suponer que

si la literatura infantil es un género, en este caso, un género de habla específicamente literario, entonces podría definirse mejor por la naturaleza de su destinatario: lo que sugiere sobre la audiencia a la que habla. Y si los textos para niños escritos en diferentes tiempos y lugares para diferentes propósitos y para diferentes edades son de alguna manera similares, solo puede ser así porque las ideas que tienen los adultos en esos diferentes tiempos y lugares sobre los niños son similares y porque los destinatarios del texto para el que escriben los adultos son similares.

Para explorar estas formas de entender los conceptos del género, tratos de la diversidad étnica y actitudes hacia la edad, utilizamos muestras de bibliotecas escolares de literatura infantil y juvenil (LIJ) como punto de partida – que con demasiada frecuencia queda libre de suspicacia. A propósito de esta idea, la autora australiana, Mem Fox afirma que no existe tal cosa como un libro infantil políticamente inocente, comentando: «...todos los libros que leemos, incluso nuestros libros favoritos, están cargados políticamente»⁷. Sin embargo, Erica Hateley confirma que si bien «el género en sí mismo rara vez es objeto de crítica [en los estudios de literatura infantil], construcciones específicas de la comprensión de la subjetividad de la estructura de género; permiten o rechazan ciertos comportamientos o experiencias sobre la base del sexo biológico»⁸. Los libros influyen en cómo las personas se ven a sí mismas y a sí mismas en relación con lo que puede considerarse “el otro” dentro de una sociedad. Melinda Gates, comenta que

un estudio reciente encontró que cuando los niños tienen seis años, ya tienden a adivinar que una historia sobre ‘Una persona muy, muy inteligente’ se trata de un hombre, no de una mujer. También nota que ‘menos del 3% de las palabras en los libros de texto de historia son específicamente sobre mujeres, y solo el 5% de todas las imágenes de figuras históricas en los libros de texto son mujeres de ‘color’⁹.

Estos son solo algunos ejemplos de cómo los niños pequeños, en parte, aprenden sobre normas, expectativas y la semiótica de género, etnia y edad a

unavailable, <<https://usborne.com/blog/usborne-books-at-home/transform-your-school-library-with-usborne-books-at-home/>> (last access: 21.02.2020), que tienen varios ofrecimientos preparados con opciones específicas para todo tipo y niveles de bibliotecas escolares. Los libros seleccionados se pueden encontrar en ese tipo de paquetes.

⁶ Véase P. Nodelman, *The Hidden Adult*, Baltimore, Johns Hopkins Univ. Press, 2008.

⁷ Véase M. Fox, *Politics and Literature: Chasing the “Isms” from Children’s Books*, «The Reading Teacher», vol. 46, n. 8, 1993, pp. 654-658.

⁸ Véase E. Hateley, *Gender*, in P. Nel, L. Paul (edd.), *Keywords for Children’s Literature*, New York, London, New York University Press, 2011, p. 86.

⁹ Véase M. Gates, *Women, Power, and Influence: Seven Part Series: Gender Equality is within our Reach*, Last updated: 16.10.2019, <<https://hbr.org/cover-story/2019/09/gender-equality-is-within-our-reach>> (last access: 21.02.2020).

través de la literatura infantil y juvenil (LIJ), pero este estado de cosas se está cuestionando. Ursula Le Guin observa que

El género en la literatura... sigue siendo un tema molesto. Los libros escritos por mujeres continúan siendo marginados o segregados, reciben menos premios literarios ‘importantes’ y... Mientras escuchemos sobre la ‘escritura femenina’ pero no la ‘escritura masculina’, porque se supone que esta última es la norma – el equilibrio no es justo... Espero el día en que ni la palabra [feminismo ni... el casi ausente... masculinismo] sean necesarios¹⁰.

Le Guin toca el corazón de esta paradoja: ¿cómo se puede crear un espacio neutral, inclusivo y justo cuando hay tanto desequilibrio? De la misma manera, complejidades similares surgen en la racialización de la literatura como en el caso del género tanto por parte de sus autores como de sus personajes cuando examinamos las dinámicas de poder. En el caso de la edad, la confluencia del género y de la etnia pueden producir variaciones. La minimización, la tergiversación y la exclusión de mujeres y niñas, especialmente las de la diáspora africana, siguen siendo un problema sistemático en la literatura infantil, a pesar de los nuevos impulsos para corregirlo. La representación de la diversidad generacional no sufre tanto de exclusión, como de ciertas simplificaciones. Educar en la igualdad y la diversidad a través de la literatura infantil y juvenil es una manera de crear espacios neutrales e inclusivos con la biblioteca escolar. En este trabajo reducimos el enfoque literario a tres planos ideológicos del género, etnia y edad. Por una parte, analizamos la interseccionalidad de los papeles socioculturales y cuestiones de género y de etnia¹¹ en algunos libros. A la vez, interrogamos el tratamiento de la edad¹² de las protagonistas en los libros elegidos, explorando cómo confluyen la edad, la etnia y el género.

Los libros infantiles y juveniles elegidos para este microestudio son obras representativas de las últimas tres décadas, publicadas en 1993, 2002 y 2015. Según el criterio de selección de libros aplicado, comparten algunas similitudes en su perfil mientras se distinguen fácilmente por los niveles de lectura. El primer

¹⁰ Véase U.K. Le Guin, *Words are My Matter*, Easthampton, MA, Small Beer Press, 2016.

¹¹ Algunos estudios recientes como el de Maria Luce Schelvis-Sijpenhof confirman la existencia de una nueva modalidad de racismo en la educación holandesa, detectado en libros de texto y entrevistas a profesores de educación secundaria. Acuñada como una ideología racista *color-blind*, advierte de los peligros que conlleva. Véase M. Schelvis-Sijpenhof, *Teachers, Textbooks and Black identity. Color-blind Racism in Dutch Education (1968-2017)*, Doctoral Thesis, Department of Education Sciences, Social and Legal Sciences (Supervisors: M. del Pozo, S. Braster), Alcalá, Universidad de Alcalá, Academic Year 2019-2020.

¹² La práctica de una discriminación por edad es un problema en los Estados Unidos también vinculado a las diferencias económicas. W.A. Achenbaum, *A history of ageism since 1969*, «Generations», vol. 39, n. 3, 2015, pp. 10-16 en su breve repaso histórico también observó que «Una generación creciente de investigadores, contribuyó a una nueva comprensión de la discriminación por edad. Algunas ideas validadas por Butler y Palmore, mientras presentan enfoques novedosos, por ejemplo, demostró cómo el ageismo implícito generaba efectos adversos para la salud. Los estereotipos dirigidos previamente a los afroamericanos o las mujeres fueron internalizados por los estadounidenses mayores».

libro analizado es un libro ilustrado con palabras aliterativas simples que siguen un ritmo y repetición muy predecibles. La narración lineal de la historia expresada por parte del adulto mantiene una dependencia integral de las imágenes dibujadas. El siguiente libro es de capítulos cortos y no tiene dibujos intercalados. La narración a veces está compartida entre otros personajes y hace saltos en la cronología de la historia. El último libro analizado para este microestudio está contado desde la perspectiva de la protagonista adolescente. En este último caso se trata de una novela de ciencia ficción, aunque las interacciones entre los personajes son verosímiles. Los tres libros tratan en formas distintas el manejo del género igualitario. Tanto los autores como los personajes son afroamericanos. En las historias se muestran tensiones intergeneracionales. Los libros y/o sus autores han sido reconocidos y premiados por organizaciones de prestigio. Las tres obras estadounidenses han sido publicadas por editoriales grandes y suelen formar parte de paquetes especiales que se ofrecen a las bibliotecas escolares.



Pic. 1. portada de La princesa que escogía. Fuente: goodreads.com

1. Diversidad femenina *reflejada en la LIJ*

Algunos libros infantiles y juveniles merecen mención, aunque no forman parte de los análisis, por su desafío a las normas de género, a los estereotipos raciales y a las expectativas de edad. Aun así, faltan muchos libros dignos tanto de mencionar como de incluir, pero imposible reducirlos por el alcance de este microestudio. En el libro infantil ilustrado *La princesa que escogía*¹³ escrito por Ana María Machado¹⁴, con ilustraciones de Graça Lima y publicado por Norma en la Colección *Buenas Noches*, tenemos la esencia de esa obra feminista resumida en la siguiente frase: «Tengo lo que siempre quise. Sé que no escogí un príncipe, pero creo que escogí un principio, simplemente, una manera de comenzar»¹⁵. Un cuestionamiento de los varios tipos de educación ayuda a

¹³ A.M. Machado, *La princesa que escogía*, Bogotá, Colombia, Editorial Norma, 2010.

¹⁴ Machado fue galardonado en 2000 con el Premio Hans Christian Andersen y también obtuvo en 2012 el Premio Iberoamericano SM de Literatura Infantil y Juvenil.

¹⁵ Machado, *La princesa que escogía*, cit., p. 34.



Pic. 2 de la portada de *Secreto en el armario de Miranda* captada de goodreads.com



Pic. 3 de la portada de *Matriarcadia* captada de amazon.es

transmitir los efectos significantes que produce la liberación de poder aprender y elegir.

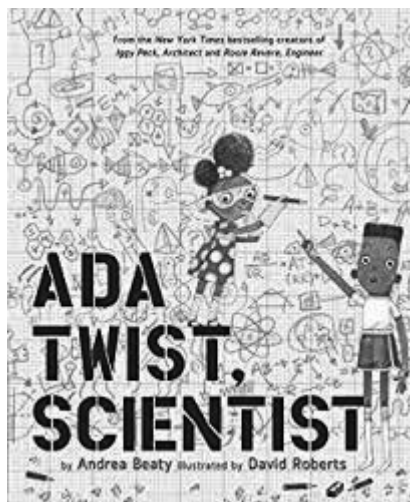
Otro ejemplo de una novela de capítulos juvenil que alerta sobre la inconveniencia de una educación impuesta y/o monolítica es el *Secreto en el armario de Miranda*¹⁶, de Sheila Greenwald publicado por Scholastic Inc. en 1977. La historia está, por un lado, subvirtiendo la ideología feminista a través de la peripecia de la madre de la protagonista, Miranda, y, por otro lado, utilizando los roles femeninos tradicionales (como jugar con muñecas) para reivindicar esa misma ideología (la libertad de elección y la autoconfianza para defender los propios intereses). Carmen Sanchidrián Blanco¹⁷ advierte sobre las formas cambiantes de la tensión entre los diferentes roles y expectativas femeninas. En las últimas décadas hay peligro de retroceder en los avances conseguidos en la igualdad socio-económico-política para las niñas y mujeres por no educar, informar y retar a las generaciones descendientes. (Pic. 2, 3)

¹⁶ S. Greenwald, *The Secret in Miranda's Closet*, USA, Dell, 1989.

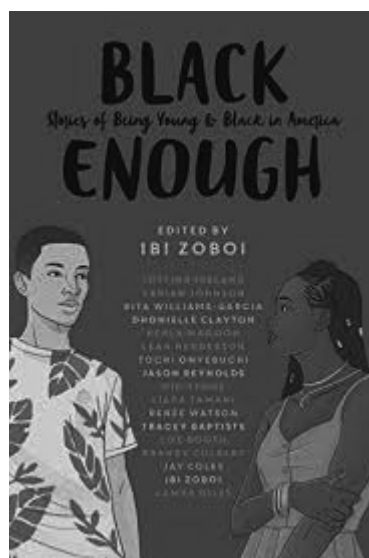
¹⁷ Véase C. Sanchidrián Blanco, *Women should remain very womanly: female university students and work in Spain in 1968*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 113-134.

Otra manifestación llamativa de ficción feminista es *Matriarcadia*¹⁸, escrito en 1915 por Charlotte Perkins Gilman y publicado como libro por Pantheon Books en 1979. Aunque no es necesariamente una novela para jóvenes adultos (el segundo de su trilogía utópica de ciencia ficción), podemos considerarla así. Revierte los roles masculinos en mujeres y elimina por completo la presencia de los hombres en la sociedad. La novela, aunque considerada feminista, se queda corta debido a sus creencias racistas, colonialistas y clasistas, perpetuando los estereotipos físicos de una belleza idealizada y la ausencia de las diferencias de habilidades tanto las condiciones físicas como mentales y psico-emocionales. (Pic. 4)

En cambio, *Ada Magnífica, científica*¹⁹ de Andrea Beaty, ilustrado por David Roberts comienza con el personaje principal demostrando un retraso en la producción del habla que finalmente da paso a preguntas y experimentación intensas basadas en las observaciones suyas del mundo que le rodea. Respetando las diferencias de su hija y apoyando la curiosidad de Ada en sus intereses en las Ciencias, Tecnología, Ingeniería y Matemáticas (áreas de estudios donde las mujeres y aún menos las mujeres negras siguen siendo una minoría), sus padres «rehicieron su mundo». Es particularmente importante apreciar la aceptación e inclusión de las diferencias de su hija como un reflejo de actitudes actuales sobre diferencias de ser y diferencias de capacidades. Sköld y Vehkalahti, historiadores de la educación y de la infancia, observan que tradicionalmente, «Los niños discapacitados, [...] representan



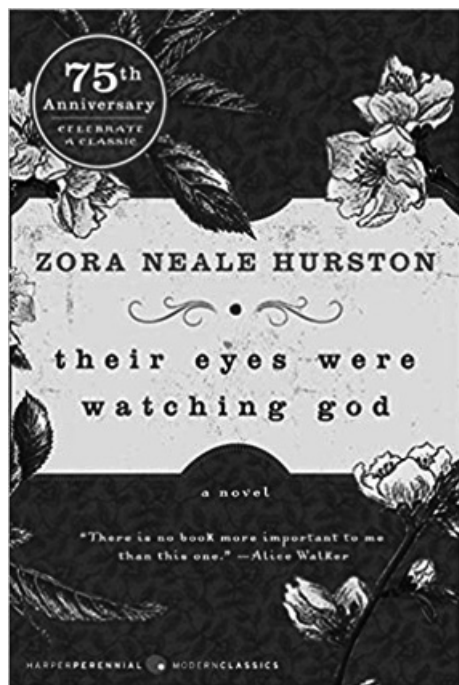
Pic. 4 de la portada de *Ada Magnífica* captada de amazon.es



Pic. 5 de la portada de *Black Enough: Stories of Being Young & Black in America* captada de amazon.es

¹⁸ C.P. Gilman, *Herland*, London, Women's Press, 2001.

¹⁹ A. Beaty (au.), D. Roberts (ill.), *Ada Twist, Scientist*, New York, Abrams Books for Young Readers, 2016.



Pic. 6 de la portada de *Sus ojos miraban a Dios* captada de amazon.es

[...] ejemplos de niños y jóvenes marginados, cuyas voces rara vez se han escuchado en las historias principales»²⁰. (Pic. 5)

Para reflexionar sobre cómo el mundo actual puede ser rehecho o reinterpretado, nos fijamos en la obra *Black Enough: Stories of Being Young & Black in America*²¹, editado por Ibi Zoboi, escrito por muy reconocidos autores especialistas de literatura para adolescentes, entre ellos Jason Reynolds²². Es una colección de historias cortas que explora innumerables formas de roles de género, de etnia y de ser joven sin divorciarse del pensamiento feminista que abarca problemas de salud mental, dinámicas familiares, limitaciones sociales y navegar por dentro y fuera de grupos marginados tales como lesbiana, gay, bisexual, transgénero, y queer (LGBTQ), grupos religiosos o clases económicas. (Pic. 6)

Por último, consideramos *Sus ojos miraban a Dios*²³ escrito por Zora Neal Hurston, originalmente publicado en 1937 por J. B. Lippincott & Company, donde confluyen intensamente las aspiraciones feministas con las realidades complejas que matizan la vida basada en el género, la etnia y la edad. La protagonista, Janie Crawford, una afroamericana de unos cuarenta años, revela su historia vital donde aprendemos que es la última en una línea generacional de víctimas de infancias robadas, racismo y abusos violentos. Aunque Janie consigue la independencia económica, no puede escapar de los juicios, desprecios y críticas sociales. Igual que en la actualidad no hay soluciones contundentes a los problemas que enfrentan y

²⁰ Véase J. Sköld, K. Vehkalahti, *Marginalized children: methodological and ethical issues in the history of education and childhood*, «History of Education», vol. 45, n. 4, 2016, pp. 403-410.

²¹ I. Zoboi (ed.), *Black Enough*, New York, NY, Balzer + Bray, an imprint of HarperCollins Publishers, 2019.

²² «Jason Reynolds, embajador nacional 2020-21 para literatura juvenil, es el séptimo escritor en ocupar este puesto. El Embajador Nacional de Literatura para Jóvenes es una iniciativa de la Biblioteca del Nacional (The Library of Congress de E.E.U.U.), en colaboración con Every Child a Reader y el Children's Book Council, con el generoso apoyo de Dollar General Literacy Foundation». J. Reynold, *GRAB THE MIC: Tell Your Story*, Last updated: not available, <http://www.read.gov/cfb/ambassador/> (last access: 21.05.2020).

²³ Z.N. Hurston, *Their Eyes were Watching God*, New York, Perennial, 1998.

afectan a las mujeres y gente madura tampoco la novela nos deja con una clara resolución. Todos estos libros infantiles y juveniles son muestras, desde el último siglo hasta ahora, de que son muy diferentes en su tratamiento del género, de la etnia y de la edad, pero coinciden en su búsqueda de un mundo (tanto imaginario como real) mejor, a pesar de sus diversas perspectivas feministas.

2. Marco teórico, el feminismo postmoderno y la LIJ

La cuestión del género, la diversidad y la edad en España tienen mucho en común con los mismos temas en los EEUU. Navegaremos entre ambos para encontrar lo que el antropólogo cultural, Clifford Geertz²⁴ ha llamado redes subjetivas de significados auto generadas. Con este entendimiento, tenemos en cuenta la advertencia de la especialista en literatura infantil y juvenil (LIJ), Karen Coats de que «puede surgir un sesgo inconsciente, enmascarado como objetividad, cuando suponemos que todas las tradiciones literarias tienen los mismos valores, objetivos y estructuras»²⁵. La teoría feminista entiende que la mayoría de las sociedades priorizan a los hombres sobre las mujeres y llevan esta comprensión a todos los aspectos de la vida. El acceso completo económico y la paridad, la participación política y la posesión de todos los derechos y privilegios sociales son fundamentales. Sin embargo, la autora, Chimamanda Ngozi Adiche²⁶ reconoce que la palabra, en sí misma, “feminista” tiene mucha carga negativa que implica ser infeliz, odiar a los hombres y otras posturas contrarias.

¿Cómo se armonizan tantas interpretaciones y prácticas de igualdad y diversidad tan diferentes? ¿Por qué los puntos en común son importantes y necesarios y por qué son evasivos y a veces peligrosos? La idea postmodernista del Nuevo Historicismo insiste en que hay varias historias, algunas previamente excluidas, algunas recuperadas y otras reinterpretadas. Coats explica que Paul Du Gay destaca cinco procesos principales para «situar un texto dentro de su contexto histórico: representación, identidad, producción, consumo y regulación»²⁷. Tony Watkins usa la definición de cinco puntos que tenía el crítico del Nuevo Historicismo, H. Aram Veaser, explicando:

que cada acto expresivo está inserto en una red de prácticas materiales; que cada acto de desenmascaramiento, crítica y oposición utiliza las herramientas que condena y se arriesga a caer en las prácticas que expone; que los ‘textos’ literarios y no literarios circulan de

²⁴ Véase G. Clifford, *The Interpretation of Cultures*, New York, Basic Books, 1973.

²⁵ Véase K. Coats, *The Bloomsbury Introduction to Children's Literature*, London-New York, Bloomsbury Academic, 2017, pp. 92.

²⁶ Véase C.N. Adichie, *We should all be Feminists*, London, Fourth Estate, 2014, p. 8.

²⁷ Véase Coats, *The Bloomsbury Introduction to Children's Literature*, cit., p. 91.

manera inseparable; que ningún recurso, imaginativo o de archivo, da acceso a verdades inmutables o expresa una naturaleza humana inalterable; expresa una verdad universal y que un método crítico y un lenguaje adecuado para describir la cultura bajo el capitalismo participan en la economía que describen²⁸.

Watkins también cita a Mitzi Myers como una fuente para entender cómo funcionan las nuevas ideas historicistas dentro de la literatura infantil y juvenil (LIJ). Myers sostiene que este enfoque de un nuevo historicismo en LIJ:

integraría el texto y el contexto socio histórico, demostrando por un lado cómo las formaciones culturales extraliterarias moldean el discurso literario y por el otro cómo las prácticas literarias son acciones que hacen que las cosas sucedan: configurando la conciencia psíquica y moral de los lectores jóvenes, pero también realizando muchos tipos más diversos de trabajo cultural, desde satisfacer fantasías de autor hasta legitimar o subvertir ideologías de clase dominante y de género²⁹.

Según Felperin hay dos escuelas del Nuevo Historicismo: una británica y otra estadounidense. La terminología que se emplea en la escuela británica se llama *cultural materialism*³⁰ donde «el marxismo nunca ha estado realmente ausente»³¹. Y la vena estadounidense del Nuevo Historicismo suele conocerse como *cultural poetics* donde «el marxismo nunca ha estado realmente presente»³². Esa interpelación de ambas marcas, estadounidense y británica se puede combinar en el contexto de la LIJ.

Consideremos, por un momento, cuánto ha evolucionado la cultura occidental en su comprensión del niño, la infancia y la literatura infantil. Watkins vuelve a acudir a las conclusiones de Myers sosteniendo que «las nociones de ‘niño’, ‘infancia’ y ‘literatura infantil’ son contingentes, no esencialistas; personificando la construcción social de un contexto histórico particular»³³. Caruso³⁴, a cambio, argumenta que el concepto de ‘niño’ y ‘infancia’ ha evolucionado desde la idea de que es la manifestación de inclinaciones sensoriales y obligaciones morales

²⁸ Véase T. Watkins, *History, Culture and Children's Literature*, in P. Hunt, S. Ray (edd.), *International Companion Encyclopedia of Children's Literature*, London-New York, Routledge, 2005, p. 34.

²⁹ Watkins, *History, Culture and Children's Literature*, cit., p. 34. También véase T. Watkins, *Space, History and Culture: The Setting of Children's Literature*, London-New York, Routledge, 2009, pp. 50-72.

³⁰ Recordemos que Marvin Harris ya trabajó el materialismo cultural a finales de los 70 del siglo XX, aunque toma prestado el término, es quien le dio fuerza y lo considera «la estrategia que ha resultado ser más eficaz en [su] intento de comprender las causas de las diferencias y semejanzas entre sociedades y culturas», *El Materialismo cultural*, Madrid, Alianza Editorial, 1982, p. 11.

³¹ T. Watkins, *History, Culture and Children's Literature*, in Hunt, Ray (edd.), *International Companion Encyclopedia of Children's Literature*, cit., p. 34.

³² *Ibid.*

³³ *Ibid.*, p. 35. También véase Id., *Space, History and Culture: The Setting of Children's Literature*, cit., p. 55.

³⁴ Véase M. Caruso, *Learning and new sociability: schooling and the concept of the child in the Spanish Enlightenment*, «Paedagogica Historica», vol. 48, n. 1, February 2012, pp. 85-98.

hasta ser un producto de discursos y relaciones sociales. La comunicación y las interacciones sociales funcionan como fuerzas centrales mitigadas por el poder de los entornos educativos para definir al niño. Si utilizamos la cronología de Coats³⁵, podemos observar desde épocas anteriores que los niños eran vistos como pequeños adultos que necesitaban madurar lo más rápido posible. Sin embargo, a medida que avanzamos, las ideas religiosas influyeron en cómo se veía a los niños y, por lo tanto, se los consideraba «regalos de Dios». Las ideas no seculares sostenían que los niños nacían malos y necesitaban desarrollar autocontrol mientras orientaban su brújula moral. Estos entendimientos duraron hasta alrededor de la Ilustración cuando el filósofo francés, Rousseau y otros pensaron que los niños eran pizarras en blanco, tabula rasa, ni buenas ni malas, sino influenciadas por la sociedad. Siguiendo esta creencia, podemos observar fácilmente cómo la sociedad occidental se trasladó a la idea de que los niños necesitan protección, poniendo en juego la idea posterior de que los niños son la esperanza para nuestro futuro. Ahora estamos en una etapa, respaldada por investigaciones significativas, en la que entendemos a los niños como un conjunto diverso y único de individuos con diversas habilidades, experiencias y temperamentos. La infancia se establece como una etapa fundamentalmente distinta de la vida desde la adolescencia y la edad adulta.

Reconociendo a los niños como personas dignas de ciudadanía, protección y derechos, idea apoyada por el activismo y trabajo de científicos, educadores y políticos, podemos ver el aumento de espacios específicos para su uso, especialmente espacios literarios. Esto es particularmente relevante para las niñas que históricamente han estado privadas de aspectos específicos de la vida y las niñas de la diáspora africana a las que se les ha negado directamente el acceso a las oportunidades de la vida y la participación en la sociedad como personas completas. Las ideologías feministas deberían verse obligadas por un compromiso humanista de incluir verdades inconvenientes de diferentes historias, experiencias y futuros que afecten no solo a algunas mujeres y niñas o ciertos hombres y niños, sino a todas las personas, independientemente de dónde se encuentren en el espectro de género.

Usando el trabajo de Umberto Eco, Charles Sarland³⁶ explica cómo una pluralidad de códigos conduce a una pluralidad de entendimientos. Asumiendo que todas las producciones son de alguna manera ideológicas, pueden suceder tres cosas. En primer lugar, los lectores de un texto pueden asumir o subsumir esas cosmovisiones. También pueden importar sus propias creencias o ignorar las presentadas. Por último, los lectores pueden cuestionar el texto. En este trabajo, cuestionamos tres muestras de literatura infantil y juvenil dentro del marco teórico del feminismo y el nuevo historicismo.

³⁵ Véase Coats, *The Bloomsbury Introduction to Children's Literature*, cit., pp. 8-81.

³⁶ Véase C. Sarland, *Critical Tradition and Ideological Positioning*, in P. Hunt (ed.), *Understanding Children's Literature*, London-New York, Routledge, 2009, pp. 30-49.

3. *Análisis de la interseccionalidad del género, la etnia y la edad en la LIJ*³⁷

A continuación, investigamos en fuentes primarias muestras de una biblioteca escolar estadounidense de cómo se manifiestan las dimensiones del género, la etnia y la edad. Estas tres publicaciones recientes estadounidenses abarcan las últimas tres décadas. La primera es un libro ilustrado publicado a principios del presente siglo, la segunda, un libro de capítulos juvenil de la última década del siglo pasado y finalmente una novela para jóvenes adultos más reciente, de 2015. A pesar de estas muestras, se informa en *The Guardian* que en el Reino Unido

de los 100 mejores libros ilustrados para niños en 2018, ... los personajes masculinos continúan dominando...: [un niño o niña] tiene 1,6 veces más probabilidades de leer [un libro] con un protagonista masculino que uno femenino... Los personajes masculinos superan en número a los personajes femeninos en más de la mitad de los libros, mientras que las mujeres superan en número a los hombres menos de una quinta parte³⁸.

Por eso, era importante en el criterio que se incluyeran personajes femeninos. Hateley³⁹ sitúa el origen de las nociones de «esferas separadas» y «la biología como destino» como una característica de la literatura infantil y juvenil del siglo XIX en la que los personajes masculinos mantienen los papeles activos como

promotores, hacedores, exploradores, aventureros, criaturas de acción, astucia, travesuras, intelecto y liderazgo [...] Mientras, en un llamativo contraste, los personajes femeninos carecen de iniciativa, curiosidad y se presentan como acompañantes, subordinados [...] dóciles, pasivos, emocionales y sin imaginación [...] objetos de adulación y desprecio masculinos ambivalentes⁴⁰.

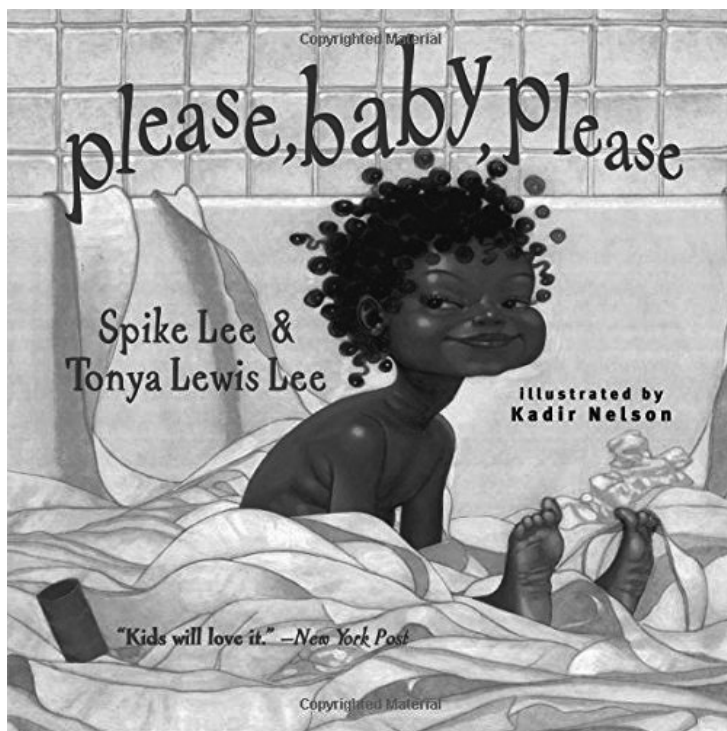
Los libros seleccionados ofrecen un contrapunto a esas normas de los siglos anteriores y de ahora. Los autores rompen esferas separadas, dan papeles agentivos a las niñas y cambian destinos basados en la biología. La literatura infantil y juvenil es un sitio de acción performativa de género, etnia y también,

³⁷ La palabra “interseccionalidad” fue concebida por la profesora de la Facultad de Derecho de la Universidad de California, Kimberle Crenshaw. Esta palabra es utilizada habitualmente para explicar metafóricamente el concepto de cómo convergen varias facetas de la identidad del individuo. También, y como consecuencia, de cómo interactúan esas facetas con las múltiples formas de la desigualdad, la marginalización y la tergiversación, a veces potenciándose entre sí y creando obstáculos que no se entienden entre el grupo dominante o entre los que aceptan las normas establecidas que no respetan ni la igualdad, ni la justicia social. Véase K. Crenshaw, *Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics*, «University of Chicago Legal Forum», vol. 1989, n. 1, 1998.

³⁸ D. Ferguson, *Highly Concerning: Picture Books Bias Worsens as Female Characters Stay Silent*, *The Guardian*, Last updated: 13.06.2019, <<https://amp.theguardian.com/books/2019/jun/13/highly-concerning-picture-books-bias-worsens-as-female-characters-stay-silent>> (last access: 21.02.2020).

³⁹ Hateley, *Gender*, cit., p. 87.

⁴⁰ *Ibid.*



Pic. 7 de la portada de *Please, Baby, Please* captada de amazon.es

de edad. Las historias que nos presentan los autores juegan con las normas, expectativas y la semiótica de estas identidades.

4. Un libro ilustrado

*Please, Baby, Please*⁴¹ del matrimonio Spike Lee⁴² y Tonya Lewis Lee, ilustrado por Kadir Nelson quien fue otorgado la Medalla Caldecott en 2014, es una historia sobre un/a niño pequeño y su relación con el/la narrador/a adulto no especificado. El género del personaje infantil es intencionalmente evasivo. Hay oportunidades en el texto en las que se puede insinuar el género, pero los autores y el ilustrador tienen cuidado de no guiar a los lectores hacia una comprensión de un género u otro. (Pic. 7)

⁴¹ S. Lee, T.L. Lee (au.), K. Nelson (ill.), *Please, Baby, Please*, New York, Simon & Schuster, 2002.

⁴² Lee es más conocido como un director de cine internacionalmente famoso con varios premios y reconocimientos, entre ellos Óscars en 2015 y en 2019.

Textualmente, no es más importante que el reconocimiento del personaje sea el de un niño o una niña. Al acercarse desde una perspectiva de la psicología del desarrollo, el personaje infantil se utiliza como fuente de la historia para obtener una visión psicológica. Para hacer esto, podemos recordar las ocho etapas de desarrollo de Erik Erikson. Más específicamente, la segunda etapa entre las edades de dieciocho meses y tres años cuando el/la niño experimenta la tensión entre la autonomía en oposición a la duda y la vergüenza. De acuerdo con la teoría del desarrollo de Freud, él o la protagonista está en la etapa oral, la observamos comiendo arena o comiendo sus guisantes. Hay evidencia de una clara comprensión piagetiana del sistema sensoriomotor cuando se ve el/la niño pateando o jugando. Estos son hitos no basados en el género ni difieren entre las etnias. El personaje infantil tanto como el/la niño que interactúa con el libro está aprendiendo a través de estas experiencias, navegando por sistemas de conocimiento conocidos y desconocidos que Vygotsky identifica como la zona de desarrollo próximo. Sin embargo, se evitan los elementos binarios y las codificaciones de género.

Visualmente, la importancia de que el personaje infantil sea negro también es bastante clara, evidenciado por los planos cortos. Este trabajo proporciona una serie de expectativas que uno podría tener no tanto sobre las actividades que realizan las niñas o los niños pequeños, sino sobre las actividades que realiza el niño o niña negro/a. Las respuestas se narran por medio de las ilustraciones situacionales del/la niño/a junto con amonestaciones del padre o madre insinuada. No se muestra claramente que ni la madre ni el padre estén acompañando al/la niño/a durante todo el día. El lector se presenta con un(a) niño/a afroamericano de clase media de un entorno heteronormativo de dos padres del siglo XXI, que habitúa una ficción intertextual que alude a las líneas pronunciadas por un personaje de la película de 1986 *She's Gotta Have It*, dirigida por Spike Lee.

En 2002, de los 3.150 libros para niños que recibió el Centro Cooperativo de Libros para Niños⁴³, menos de 70 fueron escritos por afroamericanos y menos de 170 eran sobre afroamericanos. La académica feminista y cultural, bell hooks⁴⁴ propone una simple pregunta: «¿qué significa cuando principalmente

⁴³ El Centro Cooperativo de Libros para Niños (The Cooperative Children's Book Center - CCBC) «es una biblioteca de examen, estudio e investigación no circulante para bibliotecarios, maestros, proveedores de cuidado de la primera infancia, estudiantes universitarios y otros interesados en la literatura infantil y juvenil... de la Escuela de Educación (SoE) de la Universidad de Wisconsin-Madison». The Cooperative Children's Book Center, Last updated: not available <<https://ccbc.education.wisc.edu/>> (last access: 21.02.2020). Véase The Cooperative Children's Book Center, School of Education, University of Wisconsin-Madison, Publishing Statistics on Children's/YA Books about People of Color and First/Native Nations and by People of Color and First/Native Nations Authors and Illustrators, Last updated: 21.11.2019, <<https://ccbc.education.wisc.edu/books/pcstats.asp>> (last access: 21.02.2020).

⁴⁴ Véase b. hooks, *Yearning: Race, Gender and Cultural*, Boston, MA, South End Press, 1990. Desde que cambió su nombre en la universidad, lo escribe con minúsculas como recordatorio de

hombres y mujeres blancos están produciendo el discurso sobre ‘el otro’?» Los temas de género están inextricablemente vinculados a temas raciales y económicos en una sociedad. Hay una fuerza innecesaria y predominante que intenta analizar estas variables por separado. En 1963, *Un día de nieve*⁴⁵ de Ezra Jack Keats fue el primer libro ilustrado con un niño afroamericano protagonista sin ningún estereotipo negativo. En términos de valor cultural y social, este trabajo es parte de una conversación significativamente más grande sobre la historia afroamericana y la creación de la historia en los Estados Unidos. (Pic. 8)



Pic. 8 de la portada de *Un día de nieve* captada de amazon.es

Culturalmente, a los lectores se les ofrece una visión de una familia afroamericana que refleja una narrativa básica de padres e hijos. Económicamente, existe una interpretación basada en un ingreso disponible indirectamente demostrado para la participación activa en la cultura actual del consumismo. Después de las dos guerras mundiales, los juguetes, los libros y los artículos específicos para niños, como la ropa, los vídeos y los muebles se adquieren y se utilizan con más facilidad y frecuencia. También el uso del agua llega a ser un marcador económico. La cantidad material, la presencia en lugares específicos y los usos de recursos conlleva ciertas expectativas sociales, además de no contemplar que no estén disponibles. La identidad de género del personaje infantil dentro de esta red de significados y conocimientos se vuelve insignificante. En cambio, llaman la atención las intervenciones intertextuales extendidas a través de la letanía de súplicas que implican una versión evolucionada del personaje de la película, *Mars Blackmon*. En la siguiente cita de Margaret Morganroth Gullette afirma que «Las fuerzas económicas multiplican las fuerzas de representación para hacer que cualquier sujeto sea etiquetado»⁴⁶. El adulto que compraría este libro podría ser un/a abuelo/a que vio la película antes mencionada cuando se estrenó por primera vez, experimentó el Movimiento de Derechos Civiles de los años sesenta en los Estados Unidos y el consiguiente cambio cultural o todo lo anterior. El/a consumidor/a adulto también podría ser una persona que se

humildad. Véase P. Díaz, *¿Sabes quién es bell hooks?* (sí, se escribe con minúsculas), Last updated: 26.02.2018, <<https://www.harpersbazaar.com/es/cultura/viajes-planes/a15431743/quien-era-bell-hooks-feminismo/>> (last access: 21.02.2020).

⁴⁵ E.J. Keats, *The Snowy Day*, New York, Viking Press, 2012.

⁴⁶ M.M. Gullette, *The wonderful woman on the pavement: middle-ageism in the postmodern economy*, «Dissent», Oct. 1, 1995, p. 508.

adscribe a ciertas ideologías posmodernas de diversidad tanto de etnia como de género.

5. *Un libro de capítulos juvenil*

El siguiente libro, *Toning the Sweep*⁴⁷, escrito por Angela Johnson es una historia lírica de capítulos cortos sobre la relación entre una familia afroamericana de tres generaciones de mujeres. El título se refiere a la costumbre de golpear un arado u otra pieza de metal con un martillo cuando alguien muere. Narrado por Emmie, una joven de catorce años, describe el proceso de cómo ella y su madre están ayudando a su abuela, que tiene un cáncer terminal, a cerrar su casa en el desierto de California para mudarse a vivir con ellas dos y su yerno en Cleveland, Ohio. El género, la etnia y la edad de estos tres personajes son inevitablemente significativos en la narrativa, sin embargo, en lugar de producir experiencias de limitaciones, estas características enriquecen la historia con múltiples matices sobre las libertades de poder elegir, el conocimiento de la ascendencia y el poder de escuchar y contar historias. (Pic. 9)

La abuela, Ola, la madre, Diane, y la hija, Emmie, no están obligadas a quedarse en un solo lugar, aunque puede parecer algo irónico. Diferentes circunstancias las impulsan a mudarse: Ola se aleja de la tragedia personal en Alabama. Diane se aleja del trauma y del desierto de California. Emmie se aleja del desconocimiento del peso emocional del hogar de su abuela y los secretos familiares. Dónde se mueven, cómo se mueven y por qué se mueven ofrece una introspección crítica como tema a través del libro. Con esto en mente, hay que recordar que incluso en la sociedad occidental del siglo XX, se esperaba que las mujeres se quedaran con o cerca de sus familias. Se esperaba que una viuda permaneciera cerca de la familia de su esposo. Una joven que viaja sola por el país estaría rompiendo con el decoro general. Tampoco se espera que una adolescente menor de edad se vaya con un coche grande por la noche, sin permiso, sin supervisión o sin licencia legal. Johnson crea estas situaciones en varias capas para cada uno de sus personajes y no los juzga, sino que coloca sus acciones a la luz natural de su personalidad y temperamento, no de su género. Por ejemplo, Johnson expone los comentarios de David en la mente de Emmie tal y como ella imagina que él lo diría, «Siempre creíste que conducir era como estar libre de todo, pero tu madre lo veía como algo peligroso»⁴⁸. Son giros como este los que favorecen la multiplicidad de interpretaciones.

⁴⁷ A. Johnson, *Toning the Sweep*, New York, Orchard Books, 1993. Ganadora del premio Coretta Scott King de 1994 y de School Library Journal Mejor Libro 1993.

⁴⁸ *Ibid.*, p. 29.



Pic. 9 de la portada de *Toning the Sweep* captada de amazon.es



Pic. 10 de la portada de *Binti* captada de amazon.es

Ola no es una abuela típica. Vive sola, conduce deprisa y cuando se fue de casa su única hija, no lloró sino que le preparó una merienda para el viaje y «siguió ese autobús por cinco millas por el polvoriento camino del desierto»⁴⁹. Diane aprecia su físico de piernas largas y pies grandes, no intenta cambiarla. A Emmie no le preocupa ser «cool» para sus amigos. Está cómoda consigo misma. El libro está escrito con un encanto abrumador de subestimaciones y una simplicidad discordante. Johnson escribe sobre lo que duele con una belleza prosaica que aprecia profundamente lo cotidiano. Es con esta tierna voz narrativa que el lector llega a comprender que la fuerza y la mediación feminista no siempre son ruidosas. La etnia de esta familia es de una gran importancia en sus vidas. El abuelo de Emmie fue asesinado por ser afroamericano. Los personajes masculinos retratados en la novela no controlan ni se imponen a las mujeres. Las apoyan en sus diferentes etapas de la vida. A medida que el lector llega a una comprensión más profunda de las experiencias de cada mujer, se dan pistas sobre la complicidad entre los hombres y las mujeres y la naturaleza de sus relaciones. Esta complicidad también se refleja en las relaciones entre las mujeres. Después de la muerte del esposo de Ola, Charles, el espacio que

⁴⁹ *Ibid.*, p. 52.

queda parece ser ocupado por su nueva amiga íntima, Martha, cuya relación puede o no ser de naturaleza amorosa (nunca se afirma claramente, pero se insinúa). Diane tuvo una relación cercana con su padre que fue destrozada por su asesinato. Ella encuentra el amor y la conexión con su esposo. A su vez, el esposo respeta su espacio al no interferir ni interrumpir el tiempo que las tres mujeres comparten juntas. El amigo cercano de Emmie, David, es un oyente paciente, atento y sin prejuicios. La acompaña emocional y literalmente sin hacerla de menos, a pesar de tener dos años más. Parece haber una corriente subyacente de atracción, pero Emmie lo ignora (o no se da cuenta) y enfoca su atención en las relaciones de apoyo que su abuela tiene en su comunidad. Estas son actuaciones banales donde vive el feminismo.

6. Una novela para jóvenes adultos

El último libro que analizamos es una novela de ciencia ficción afro-futurista para jóvenes adultos de Nnedi Okorafor titulada *Binti*⁵⁰. Es una historia de estilo *bildungsroman* en la que el personaje principal, que también da título a la novela, viaja fuera de casa, desafía las normas y expectativas socioculturales por una joven Himba y se convierte en la primera de su etnia en estudiar en una prestigiosa universidad intergaláctica. Desde las páginas iniciales, la autora sitúa al lector con una descripción precisa de los desafíos que se suponen la edad, la etnia y el género de Binti. Ir en contra de estas normas socioculturales pone en movimiento rápidamente la historia, como podemos observar en el siguiente extracto:

Aquí, yo era una extranjera; Estaba fuera de lugar... tenía dieciséis años y nunca había estado más allá de mi ciudad ... Estaba sola y acababa de dejar a mi familia. Mis perspectivas de matrimonio habían sido del 100 por ciento y ahora serían cero. Ningún hombre querría una mujer que se hubiera escapado. Sin embargo, más allá de mis posibilidades de arruinar la vida normal, conseguí un puntaje tan alto en los exámenes planetarios en matemáticas, que la Universidad de Oomza no solo me admitió, sino que prometió pagar todo lo que necesitaba para poder asistir⁵¹.

El género y la edad de Binti es un componente crucial en la historia. El hecho de ser una mujer joven es un determinante social de lo que la sociedad Himba permite, espera y no espera de ella. A pesar de que esta historia tiene lugar en un futuro lejano y algo familiar, las oportunidades que Binti tiene para su vida están preseleccionadas. Además, el momento en que ella deberá

⁵⁰ N. Okorafor, *Binti*, USA, DAW Books, 2015. Ha ganado el premio Hugo (2016) y el premio Nébula (2016) en la categoría de la mejor novela.

⁵¹ *Ibid.*, pp. 3-4.

aprovechar estas oportunidades también está predeterminado en función de su edad. Como Himba, su lugar en el mundo o en este caso, la galaxia, no implica alejarse de su familia, y mucho menos alejarse de su planeta. Binti reflexiona sobre cómo arruinará su vida la realización de estos deseos. No se trata de un brote de impulsividad, sino de una meditación profunda y consecuente. Estas características de su personaje son fundamentales para la narrativa porque crean un mayor impacto de los futuros logros de Binti, pero de manera más conmovedora, tiene verosimilitud con el estado de las cosas para muchas mujeres jóvenes ambiciosas y hábiles del presente que están confinadas, reprimidas y, en casos extremos, eliminadas por su deseo de liberarse de las restricciones sociales.

Binti declara audazmente: «Ignorar a las personas que amaba era la única forma en que podía seguir adelante»⁵². Este es un principio real que se puede implementar para lograr un cambio de nuestras sociedades. Binti se ve obligada a navegar en circunstancias extremas en las que más muertes, la supervivencia personal y la recuperación colectiva dependen de su capacidad para inutilizar por completo los límites prescritos por las normas y expectativas basadas en su género, etnia y edad – incluyendo los límites impuestos desde fuera de su sociedad y cultura Himba. Esto se nota cuando uno de los personajes extraterrestres (medusas grandes e inteligentes) intenta racionalizar, negar o disculpar sus acciones, explicando: «Biniti es incivilizada. Olvídala. Es joven, una niña». Otra de estas medusas usa las mismas variables para insultarla, diciendo: «‘Vosotros [Himba] sois buenos para esconderos, [...] especialmente las mujeres como tú’. Varias de las Medusas, incluido el/a jefe/a, hicieron temblar sus tentáculos y vibrar sus cúpulas en una clara muestra de risa»⁵³. Binti encuentra la fuerza y la capacidad para enfrentar sus problemas actuales y diseñar su futuro abrazando y a la vez rechazando sus roles prescritos. Como maestra armonizadora, Binti es capaz de encontrar armonía en el conflicto precisamente apoyándose en sus raíces Himba, su educación familiar y su profunda formación técnica en las matemáticas mediadoras que guían e informan su curiosidad y, en última instancia, su supervivencia. Binti se hace vulnerable. Algo que definitivamente tiene un lugar en el discurso de género, etnia y edad. Deja atrás, pero no abandona, varias formas de símbolos de poder cultural que le permiten a Binti obtener una posición respetada de influencia y conocimiento. Es a través de la usurpación de definiciones impuestas de quién es ella y qué puede o no puede hacer, como Binti las resitúa para empoderarse y transformar los prejuicios. Esto se encapsula con la siguiente cita: «‘Por primera vez en mi propia vida, estoy aprendiendo algo completamente fuera de las creencias fundamentales’, dijo el/a jefe/a»⁵⁴. Este es un motor ideológico para el cambio.

⁵² *Ibid.*, p. 14.

⁵³ *Ibid.*, p. 38.

⁵⁴ *Ibid.*, p. 49.

Conclusiones

En este punto, deberíamos darnos cuenta de que la narración de la identidad de género, etnia y edad en las muestras de obras que se pueden encontrar en una biblioteca escolar de la literatura infantil y juvenil (LIJ) no solo está vinculada al posicionamiento social y cultural, sino también al posicionamiento económico e histórico. Gates reflexiona que,

En todos los aspectos de la vida estadounidense, son los hombres quienes establecen las políticas, asignan los recursos, dirigen compañías, dan forma a los mercados y determinan las historias que se cuentan. Mientras tanto, los avances logrados no se han extendido a todas las mujeres. Las mujeres históricamente más marginadas en este país, incluidas las mujeres de color, las mujeres pobres y las mujeres lesbianas y transgénero, siguen siendo las más propensas a quedar atrapadas en empleos de salario mínimo, las menos propensas a ocupar puestos directivos y las más propensas a enfrentar el acoso sexual y la violencia de género⁵⁵.

Alana Portero, feminista trans y activista de la comunidad lesbiana, gay, bisexual, transgénero, y queer (LGBTQ) declara en una entrevista de la revista (en la versión on-line) *Vogue*, «Si aspiramos a la justicia y a la restitución tras siglos de patriarcado y capitalismo, dejar atrás a las que más lo necesitan es un acto de cinismo y de incompetencia»⁵⁶. Gates continúa escribiendo que

aunque las mujeres estadounidenses alcanzaron ese umbral del 50% en 2010 (y actualmente comprenden el 49.8% de la fuerza laboral no agrícola), las mismas viejas desigualdades simplemente nos han seguido a nuevos lugares. Todavía no estamos ganando tanto, subiendo tan alto, o teniendo una voz igual en la toma de decisiones⁵⁷.

En palabras claras y simples de la fallecida ganadora keniana del Premio Nobel, Wangari Maathai: «cuanto más alto vayas, menos mujeres hay»⁵⁸. Cuando consideramos los espacios físicos y los contextos históricos, hay implicaciones económicas reales. El poder ocupa un espacio metafórico y literal. La biblioteca escolar es un sitio de poder que ofrece un umbral a la diversidad de ideas, personas, lugares y maneras de ser pluralistas. Son los mismos lectores quienes negocian la validez y aceptación de conceptos y valores que moldean tanto el pasado, como el presente y futuro. Las normas de género, etnia y edad no se crean de forma aislada. Las personas están formadas por una cultura mientras están suspendidas en sus redes de interconexión de

⁵⁵ Gates, *Women, Power, and Influence: Seven Part Series: Gender Equality is within our Reach*, cit.

⁵⁶ Correa, *En 2019. El feminismo será interseccional (o no será)*, cit.

⁵⁷ Gates, *Women, Power, and Influence: Seven Part Series: Gender Equality is within our Reach*, cit.

⁵⁸ Véase C.N. Adichie, *We should all be Feminists*, London, Fourth Estate, 2014, p. 9.

importancia. El desafío individual o colectivo a estas normas informan la composición de una sociedad.

En este trabajo interrogamos la literatura infantil y juvenil (LIJ), analizamos un libro ilustrado de un/a protagonista no específico de género que demuestra que la infancia no tiene que estar manipulada por el género, exploramos un libro juvenil de capítulos cortos en que la protagonista conoce la fuerza de las historias personales de tres generaciones de mujeres y, por último, consideramos una novela para jóvenes adultos en la cual las nociones de género, etnia y edad son rechazadas y aceptadas a la vez como una fuente de fortaleza, orientación y resistencia para efectuar un cambio. Estos libros representativos no fueron elegidos al azar sino según el criterio previamente descrito (por ejemplo, sus editoriales, sus reconocimientos, sus perfiles de sus protagonistas, etc.). Estas representaciones modernas de género, etnia y edad que se encuentran en la literatura infantil y juvenil deben ser cuestionadas, al igual que cualquier otra obra literaria. La literatura informa a la sociedad sobre las normas y expectativas establecidas, ya sea en su descripción o desviación de las convenciones preestablecidas. Es decir, también ofrece contradiscursos y resistencias. La periodista Alba Correa determina que

la lucha del colectivo de mujeres y hombres con diversidad funcional manifiesta se articula en torno a potenciar el respeto por la dignidad humana, la igualdad, la libertad personal; propiciar la inclusión social; los principios de vida independiente, no discriminación y accesibilidad universal; que se puedan obtener todos los recursos necesarios para desarrollar una vida independiente y autodeterminada en el mismo grado que, por simple génesis, posee y ejerce el resto de la ciudadanía⁵⁹.

El proceso de interactividad e interdependencia entre personas de diferentes puntos del espectro de género, diferentes etnias y otras facetas de la vida crea significado dentro y alrededor de un texto. La sociedad contemporánea que habitamos produce constantemente narraciones literales y metafóricas de variables humanas claves⁶⁰. Adiche confirma que el feminismo es parte de los derechos humanos, sin embargo, «elegir usar la vaga expresión de los derechos humanos es negar el problema específico y particular del género»⁶¹. A diferencia de Adiche y de forma parecida a Correa, no creo que el género, la etnia y la edad sean cuestiones completamente diferentes y separadas, más bien puntos entrelazados que forman teselas oscilantes a lo largo del espectro de los derechos humanos, las libertades civiles y las responsabilidades personales. Las personas se ven afectadas por la cultura y la cultura se ve afectada por las personas. Es una simbiosis mutualista dinámica de la existencia que lucha por estar libre de conceptos binarios. Las diversas formas en que la literatura infantil y juvenil

⁵⁹ Correa, *En 2019. El feminismo será interseccional (o no será)*, cit.

⁶⁰ Adichie, *We should all be Feminists*, cit., p. 17.

⁶¹ *Ibid.*

construye papeles de género, identidades raciales y actuaciones de edad ocurren a través de un posicionamiento social y cultural que refleja periodos históricos y están incrustados en estructuras económicas.

Constantemente producimos narraciones literales y metafóricas de género, etnia y edad, vinculadas al posicionamiento sociocultural que conllevan ciertas actividades económicas que involucran bienes y servicios, algunos de los cuales son libros para niños y jóvenes. De la biblioteca escolar, cada libro consumido por niños, jóvenes y adultos contiene una iteración de ideas, sentimientos y eventos. Es pertinente y necesario cultivar una selección variada de libros para poder cuestionar la forma en que se narran en ellos el género, la etnia y la edad. Con muestras más grandes y sistematizadas, este microestudio puede servir como un punto de partida a la hora de hacer análisis más profundos, amplios y extendidos. Además, con las posibilidades que nos presentan las humanidades digitales, la metodología aplicada en el estudio actual también se puede usar para diseñar bibliotecas escolares y seleccionar libros.

Tanto los académicos como los profesionales responsables de aulas infantiles y juveniles, y la comunidad educativa como colectivo influyente, deben poder entablar conversaciones valientes con el objetivo de educar y progresar. Elisa Pérez Vera declara en una entrevista reciente, «ningún progreso se puede mantener sin una enseñanza que haga hincapié en valores como la no discriminación y la igualdad, que harán que la sociedad sea más fuerte»⁶². El proceso y progreso de la interactividad y la interdependencia entre las personas para forjar un consenso colaborativo y equitativo a lo largo del espectro de género, líneas raciales y edad, puede ocurrir dentro y alrededor de los textos literarios. La investigación y el análisis críticos son aspectos fundamentales de este proceso. La biblioteca escolar compuesta a conciencia sirve de puerta de cómo la literatura infantil y juvenil (LIJ) diversificada puede tener el poder de transformar sociedades, corregir sesgos y reformar los sistemas estructurales de poder.

⁶² Véase E. Pérez Vera, *Primera mujer que dirigió una universidad*, Last updated: 07.03.2019, <https://www.65ymas.com/sociedad/elisa-perez-vera-primera-mujer-rectora_1092_102.html> (last access: 21.02.2020).

The reception of the ideas of J.H. Pestalozzi in the Greek region during the 19th Century

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ABSTRACT: Johann Heinrich Pestalozzi (1746-1827), the great Swiss pedagogue, not only decisively influenced his native country with his work, but also changed the education practice worldwide during his lifetime. The reception of Pestalozzi's pedagogical ideas and the pedagogical influence which was exercised in this way, as well, in the Greek region during the 19th century, is an important issue for the formation of Modern Greek Pedagogy. Adamantios Korais (1748-1833), who was a leading figure of the Modern Greek Enlightenment, was the one who gave prominence to the work of the great Swiss educator in Greece, as early as 1809. This activity was part of the "metakenosis" of the Lights in enslaved Greece. The leading Greek periodical of the pre-revolutionary years *Logios Hermes* (1811-1821), published in Vienna, played an important role in the dissemination of Pestalozzi's ideas. Ioannis Kapodistrias (1776-1831), the first Greek Governor, acting alongside the initiatives of the Greek Enlighteners, believed that the Greek people as a whole needed education in order to be able to claim their freedom; for that reason, he was actively concerned about the state of education in his enslaved homeland. He showed a particular interest in the educational system which was being developed during those years in Switzerland and expressed his admiration for Pestalozzi's work. Besides, Kapodistrias had personally met Pestalozzi. The Greek Governor had also expressed the same interest in the work of Pestalozzi's "faithful student", the noble politician Philippe-Emmanuel von Fellenberg (1771-1844). Unfortunately, after the Greek Governor's tragic assassination, his welfare program for the orphans, inspired by the movement of Philanthropismus, deteriorated and shrank. The Othonic monarchy, in collaboration with the Regency, which followed the assassination of Kapodistrias, imposed the one-way Bavarian educational system, with elements from the neo-humanistic and the classicist practice of the time, whereas Philanthropismus was abandoned. This trend was reinforced by many Greek educators who, as scholarship recipients of associations and bequests, studied in Germany during that period, and transferred these pedagogical ideas to Greece. Finally, systematic historical and bibliographical research shows that Pestalozzi's writings were also heavily ignored in post-revolutionary Greece.

EET/TEE KEYWORDS: Pestalozzi; Modern Greek Enlightenment; Modern Greek Pedagogy; History of Pedagogy; Greece; XIXth Century.

Johann Heinrich Pestalozzi (1746-1827), the great Swiss pedagogue, not only decisively influenced his native country with his work, but he also changed the education practice at an international level during his lifetime¹.

Pestalozzi was deeply influenced by the work of Jean-Jacques Rousseau; for nearly 60 years he carried out an unprecedented pedagogical work to which he was devoted with «apostolic disinterestedness». He founded and directed special Schools and Institutes, such as the Asylum-Poorhouse in Neuhof (1774-1779), the Orphanage in Stanz (1798), the Institute and Teaching School in Burgdorf (1800-1804), the famous Institute in Yverdon (1805-1825), whilst he wrote and published very important pedagogical works. He spent his physical and spiritual powers fully and without hesitation. Two more foundations were established in Switzerland based on his pedagogical ideas, the «Industrial School» of Fellenberg (1771-1824) in Hofwyl and the School in Wehrlin (1790-

¹ From the large literature on Pestalozzi, I note (chronologically) the following: C. Mayo, *Memoir of Pestalozzi*, London, J.A. Hessey, 1828; J. Payne, *Pestalozzi, The Influence of his Principles and Practice on Elementary Education*, London, 1875; J. Russel, *The Students' Pestalozzi (Based on R. de Guimp's Histoire de Pestalozzi)*, London, 1888; R. De Guimps, *Pestalozzi: His Life and Work*, New York, D. Appleton and Company, 1892; A. Pinloche, *Pestalozzi and the Foundation of the modern Elementary School*, London, 1902; F.H. Hayward, *The Educational Ideas of Pestalozzi and Fröbel*, Westport/Connecticut, Greenwood Press Publishers, 1904; G. Compayré, *Pestalozzi and Elementary Education*, transl. by R.P. Jago, London, 1907; H. Holman, *Pestalozzi, An Account of his Life and Work*, London, Longmans, Green and Co, 1908; J.A. Green, *The Life and Work of Pestalozzi*, London, University Tutorial Press, 1913; P. Natorp, *Pestalozzi, Sein Leben und seine Ideen*, Leipzig, Verlag von B.G. Teubner, 1919; Sister M.A. Walch, *Pestalozzi and the Pestalozzian Theory of Education*, Washington, DC, The Catholic University of American Press, 1952; M. Heafford, *Pestalozzi: His Thought and its Relevance Today*, London, Methuen & Co, 1967; F.I. Niethammer, *Philanthropinismus – Humanismus. Texte zur Schulreform*, Weinheim, Bearbeitet von W. Hillebrecht, 1968; W.S. Monroe, *History of the Pestalozzian Movement in the United States*, New York, Arno Press and the New York Times, 1969; K. Silber, *Pestalozzi: The Man and his Work*, New York, Schocken Books Inc., 1974; R.B. Downs, *Heinrich Pestalozzi: Father of Modern Pedagogy*, Boston, Twayne Publishers, 1975; R. Stach (Hrsg), *Theorie und Praxis der philanthropistischen Schule*, Rheinstetten, 1980; M. Soëtar, *Pestalozzi ou la naissance de l'educateur, Étude sur l'évolution de la pensée et de l'action du pédagogue suisse (1746-1827)*, Berne, P. Lang, Publications Universitaires Européennes, 1981; H. Blankertz, *Die Geschichte der Pädagogik. Von der Aufklärung bis zur Gegenwart*, Wetzlar, 1982; G.-B. Reinert, P. Cornelius, *Johann Heinrich Pestalozzi, Anthropologisches Denken und Handeln, Ein pädagogisches Konzept über die Zeit*, Düsseldorf, 1984; B. Nieser, *Aufklärung und Bildung, Studien zur Entstehung und gesellschaftlichen Bedeutung von Bildungskonzeptionen in Frankreich und Deutschland im Jahrhundert der Aufklärung*, Weinheim, 1992; F. Osterwalder, *Pestalozzi – ein pädagogischer Kult*, Weinheim, 1995; S. Hebenstreit, *Johann Heinrich Pestalozzi. Leben und Schriften*, Freiburg u.a., 1996; S. Mauder, *Die Bedeutung der "Geschichtlichkeit" für die Geisteswissenschaftliche Pädagogik*, Techtum, Marburg, 2006.

1855)². In addition to these, he founded special schools for the deaf and for socially maladjusted children³.

Eminent philosophers and pedagogues of his time such as Fichte, Humboldt, Nicolovius, and others, supported, promoted and spread Pestalozzi's reputation. As an outcome, Prussia, the Netherlands and other regions adopted the beliefs of this great educator and introduced them directly into their educational and teaching systems⁴. Moreover, several of his own students, who came from the USA, England, France, Russia and Hungary, upon returning to their countries, established schools that followed the principles and the spirit of Pestalozzi⁵; this fact contributed to making Pestalozzi's name and work well-known internationally.

The reception of Pestalozzi's pedagogical ideas and the pedagogical influence which was exercised in this way, as well, in the Greek region during the 19th century, is of great interest for the pedagogical events of the time and, by all means, to the formation of Modern Greek Pedagogy.

In this research we should also refer to the action of the Swiss noble philanthropist Philippe-Emmanuel von Fellenberg (1771-1844), who was «Pestalozzi's faithful student» and worked in parallel and in collaboration with him for the learning and the education of children in need, especially on agricultural matters. Besides, Fellenberg's personality and work is also associated with the Greeks both in the design of the Greek educational system during the pre-revolutionary period and in the post-revolutionary years.

Adamantios Korais (1748-1833), who was a leading figure of the Modern Greek Enlightenment, was the one who made known, for the first time in Greece, the name and the work of the great Swiss educator as early as 1809, which was part of the «metakenosis» of the Lights in enslaved Greece. It is also known that, in his book *Improvised reflections*, which is the analytical Introduction of the publication of the ancient Greek writers, in the series *Greek Library* (1805-1825), Korais made many ground-breaking proposals for the renewal of modern Greek Education, which, as K. T. Dimaras' points out, «make him a precursor to the newer pedagogical theories»⁶.

² See also M. Soëtard, *Johann Heinrich Pestalozzi*, in J. Houssaye (ed.), *Fifteen Pedagogues, Milestones in the history of pedagogical thought*, transl. by D. Karakatsani, Athens, publ. Metaichmio, 2000, p. 65 and M. Kanavakis, *Social Pedagogy, Content and Historical Evolution*, Athens, publ. Papazisis, 2002, pp. 112-114.

³ Soëtard, *Johann Heinrich Pestalozzi*, cit., p. 65.

⁴ E. Douka-Karagiannopoulou, *Pestalozzi, Pestalotsianians, Pestalotsianism*, in *Pedagogic-Psychological Encyclopaedia Dictionary*, 7 vols., Athens, publ. Ellinika Grammata, 1991, p. 3845.

⁵ I.E. Vrettos, *Theories of Education*, vol. B, *Johann Heinrich Pestalozzi*, Adamantios Korais, Athens, publ. Atrapos, 2005, p. 182.

⁶ K.T. Dimaras, *Modern Greek Enlightenment*, Fifth edition, Neollinika Meletimata-2, Athens, publ. Hermes, 1989, p. 337. See E. Stamataki, *Pestalozzi and Korais, Comparative and pedagogical research*, Athens, publ. K. Strouboukis, 1988.

In the *Introduction* of the publication of Plutarch's *Parallel Lives* (1809), Korais referred to the advantages of Pestalozzi's method and he recommended to the Community of Constantinople to send two young scholars to Europe in order to study this method:

Today, in enlightened Europe, a new pedagogic method is being spread, found by someone named Pestalozzi, who taught many other educators, who, in turn, have spread in many other places his teaching. This new method is praised by lots of people as being appropriate to deliver easily the first necessary children's lessons. There are, as well, a few who are indifferent towards it. Perhaps there are those who consider it to be a monstrosity. Which of them are right, experience will tell. However, why does it hurt to send two young people at the expense of the Commonwealth of Constantinople for this reason only, to study the Pestalozzi method and introduce it to Greece? From this innovation, if teachers do not gain anything else, they will learn to behave to children with fatherly kindness, and drive out of schools the ferocity and violence, due to which many unfortunate homunculi are uneducated and have servile beliefs⁷.

In the following year (1810), Korais tried to send Theophilos Kairis (1784-1853) to Switzerland to Pestalozzi. Kairis was a young eager-to-learn deacon, who later became not only a fighter of the Hellenic revolution of 1821, but also a great Teacher of the Genus. He would visit Pestalozzi in order to «learn from him the famous new method of pedagogy»; this plan was not realized, apparently because «the times did not allow it, as it was preferable that he be in Cydonia in the month of May»⁸.

The leading Greek periodical of the pre-revolutionary years, *Logios Hermes* (1811-1821), played an important role in the dissemination of Pestalozzi's ideas. It was the written medium of “metakenosis” of the modern European ideas. Published in Vienna during the five critical years leading up to the Greek Revolution, its directors were the clergyman Theoklitos Farmakides, and the scholar teacher Constantine Kokkinakis, who both belonged to the spiritual circle of Korais.

In the beginning of 1816, the publishers of *Logios Hermes*, who were involved in the education of the people through “metakenosis” and whose mission was to found schools in the homeland and improve the teaching method, published

⁷ A. Korais, *Introduction to the Publishing (1809) of the Lives by Plutarch*, in *Introduction to ancient Greek writers, and his autobiography*, preface by K.T. Dimaras, Athens, National Bank Cultural Foundation, 1986, pp. 351-353. Korais also notes: «And what really makes me think of Pestalozzi's finding as beneficial, is the excellent attention to making children understand the solutions to the numerical problems. Long before Pestalozzi, Plato realized the power of the arithmetic habit to sharpen young souls, and to direct them to the investigation of truth [...]», p. 352. See also P. Tzermias, *Adamantios Korais and Johann Heinrich Pestalozzi*, «Nea Estia», vol. 1355, 1983, pp. 61-62 and K.D. Malafantis, *The Pedagogy of the Modern Greek Enlightenment*, Athens, publ. Poreia, 2001, pp. 47-48.

⁸ D.P. Paschalis, *Theophilos Kairis*, Athens, publishing House «Estia», 1928, p. 14. Reprinted, with an introductory text by V. Kyrkos, Athens, publ. Typothito - G. Dardanos, 1996.

a long, very interesting article, which continues over four magazine issues⁹, in which they rush to present the main points of another important emerging pedagogical system, which was just released in France. It is the *New System of Education for Primary Schools*, Adopted in the Four Parts of the World, by Count Charles de Lasteyrie, Paris, 1815. In the first part of this book, according to the article¹⁰, reference is made to the well-known “peer-learning method” formulated by the English educationalists Joseph Lancaster and Andrew Bell, and the Greek publishers find the opportunity to compare and write «about the not less valuable and rather original system of the wise philanthropist Pestalozzi». They wish that such a comparison could be made by a «zealot of perfection and of progress in education» and also that a reference be made «to the principles on which Fellenberg’s system of pedagogy is founded in Hofwyl, and to make understandable the moral and agronomic benefits of a school» which, as they write, «found a multitude of admirers, but unfortunately no imitator»¹¹.

In February 1817, a translated “Invitation” was published in *Logios Hermes* «written by the founder of Hofwyl and addressed to the friends of the suffering humanity, during September 1816», signed by Fellenberg¹². This invitation states that «the reason for setting up the schools in Hofwyl is their founder’s belief that the time has come for active measures against the corruption of morals in order to revive the moral life of the human generation, and thus to bring it to a state worthy of the end envisioned for it by divine will [...]». Thereafter, the aims of establishing the Schools in Hofwyl (1771) and Wehrlin (1790) are described, the provision and organization of their facilities, the choice of food, the teaching method followed, and information is provided on reports and visits by distinguished people who wanted to see closely that work and the educational methods applied there. From this particular text, we are informed that Ioannis Kapodistrias (1776-1831), while he served as Ambassador of Russia to Switzerland, visited and studied with interest the educational institutions of Fellenberg. In 1814, he even submitted a special report concerning education in Switzerland to Tsar Alexander I of Russia, (special reference to this activity of I. Kapodistrias is made below).

At the end of April 1817, Constantine Asopios, a well-known scholar from Ioannina, Greece, who was a teacher at the Greek School of Trieste and later a professor at the Ionian Academy and the National University of Athens, spoke to the Greeks of Trieste on the occasion of the completion of the

⁹ «Logios Hermes», vol. 6, n. 1, January 1st, 1816, pp. 3-9; vol. 2, January 15th, 1816, pp. 17-21; vol. 3-4, February 1st and 15th, 1816, pp. 33-43; vol. 8, April 15th, 1816, pp. 113-124.

¹⁰ Certainly, this is the first time that the Greek public is informed about the “peer-teaching method”.

¹¹ They even quote the entire excerpt from the *Introduction* by Korais in the publishing of *Plutarch’s Lives*, «Logios Hermes», vol. 6, n. 8, April 15th, 1816, p. 116.

¹² *Ibid.*, vol. 7, n. 4, February 15th, 1817, pp. 65-71.

courses and the beginning of the examinations, and invited them not to show themselves inferior to the Greeks of Livorno as far as education is concerned. In his speech, he refers to the need for humanitarian education that ought to be provided by the school, above and beyond scientific training, which one can take if they desire. He offers as example the fundamental work being done «in the Pedagogic foundation of the enlightened and charitable Pestalozzi, in Yverdon, Switzerland», which he regards to be worthy of gratitude «towards the venerable elder man». He encourages wealthy people of Hellenic descent, who wish to benefit their homeland, to send Greek youths to study by covering their expenses, as well as their sons, with one basic prerequisite: «they must have educated them before to the Greek education». He even points out that the studies in Switzerland are not inappropriate for Greeks, as Pestalozzi followed Socrates's teaching and method: «[...] and so they do not think that things are inappropriate for Greeks, let them be aware that he himself admits that he is nothing else but a follower of Socratic education. See the description of this school's method by Mark Anthony Julian, who also wrote the book 'About the use of time'»¹³.

In August 1818, a long letter from K. B. of Heidelberg is published in *Logios Hermes*, dated June 6th, 1818, and it is addressed to the teacher S. in the enslaved homeland, who had asked him to recommend French bibliography on mathematics, physics, philosophy, etc. The sender refers to the new teaching methods of natural sciences in Europe, to the need for self-action of the students, he asks from the recipient information about the situation of schools in Greece, the interest of the Greeks in them, the teaching method which is followed, about the publication of new books in Greek and finally the requested list of books. Among them, there are seven pedagogy texts, two of which refer to the Pestalozzi teaching method: (a) M. A. Jullien, *Esprit de la Méthode d'éducation de Pestalozzi* (in 2 volumes) and (b) D. A. Chavannes, *Exposé de la méthode élémentaire de H. Pestalozzi*¹⁴.

In January 1820, the publishers of *Logios Hermes* refer, once more, to the "peer teaching method" and publish "with joy" the news that «the method is transferred as well to the dear homeland, starting first from Iasi»¹⁵. This news is related to the study of the method and the adaptation of the teaching tables in Greek by the pioneering teacher George Kleovoulos (1785-1828), also known as Philippopolitis¹⁶. He moved to Paris (1817-1819) in order to study this method and then he introduced it and applied it since July 1819 to the first Peer Teaching School, which he founded in Iasi, Moldova, with financial support

¹³ *Ibid.*, vol. 7, n. 15, August 1st, 1817, pp. 351-352 and 370.

¹⁴ *Ibid.*, vol. 8, n. 15, August 1st, 1818, p. 433.

¹⁵ *Ibid.*, vol. 10, n. 1, January 1st, 1820, p. 21.

¹⁶ For the personality and work of this pioneering teacher, see, among others, G.K. Sakkas, *Georgios Kleovoulos "Philippopolitis", the first Greek scientist and neglected pedagogue*, Athens, 1956.

from lord Nikolaos Rossetto or Rosnovano, a prominent personality of Dakia, originally from Phanari¹⁷. More specifically: «[...] Mr Georgios Kleovoulos from Philippopolis, who, after studying Science at the German academies, went through various educational institutions in Germany and Switzerland, especially those of Pestalozzi and Fellenberg, so as to observe various teaching methods of the various public schools, traveled to Paris to learn about the method of peer teaching that was deemed useful and necessary for the country and made the necessary preparations for its implementation [...]».

We hope that, having introduced the method there to the pleasure of the said lord and the inhabitants, he will not forget and the philopatry of the inhabitants will not prevent him from going to Greece for the dissemination of the good». From this we are further informed that G. Kleovoulos submitted the Greek tables of the new teaching method to the “Society for the Improvement of Elementary Teaching” in Paris, which enthusiastically welcomed his work and appointed him a counterpart member, addressing to him two praising letters (published in *Logios Hermes*) and one more to his sponsor, Lord of Iasion¹⁸.

In August 1820, an extensive article entitled “Thesis C.Z. sent from Paris, March 1st, 1820” was published in the same magazine¹⁹. It contains interesting thoughts and suggestions by C.Z. (Konstantinos Polychroniadis) on the improvement of the situation of Education in Greece, which refer to pedagogical achievements, methods, etc. in Europe, as well as to the «pedagogic schools of the philanthropists Pestalozzi and Fellenberg», which were achievements that had to be leveraged by Greeks in the homeland as well.

Ioannis Kapodistrias (1776-1831) acted alongside the initiatives of the Greek enlighteners and, since the establishment of the Ionian State (1801), he began to realize that the Greek people as a whole needed education in order to be able to claim their freedom and he began to get concerned about the state of education in his enslaved homeland.

When Kapodistrias served as a diplomat in the service of Tsar Alexander I of Russia, he undertook the responsibility to handle and ultimately secure the political and territorial neutrality of Switzerland. At the same time, he showed particular interest in Education, which was being developed during those years in Switzerland, and he expressed his admiration for the work of Pestalozzi, with whom he had been personally acquainted, and they were friends since the period of his studies in Italy, in the late 18th century²⁰. Kapodistrias had also expressed the same interest in the work of Pestalozzi’s “faithful student”, the noble, politician Philippe-Emmanuel von Fellenberg (1771-1844).

¹⁷ See also for more A.K. Avdali, *Reading in Greek schools of peer-teaching: The Tables of Cleovoulos (1819) and The Tables of Paris (1830)*, Athens, publ. Gutenberg, 1999.

¹⁸ «Logios Hermes», vol. 10, n. 1, January 1st, 1820, pp. 23-26.

¹⁹ *Ibid.*, vol. 10, n. 15, August 1st, 1820, pp. 434-448 and n. 16, August 15th, 1820, pp. 472-487.

²⁰ E.E. Koukkou, *Kapodistrias and Education 1803-1822*, A. The Philomuse Society of Vienna, Athens, 1958, pp. 29-30.

At the time, the Tsar was occupied by the problem of the education of the Russian people, a matter that Kapodistrias himself seems to have cultivated²¹. This fact may be explained by the assignment to Kapodistrias of a planned visit and study of the Fellenberg school system and the preparation of a detailed Report on it²².

Fellenberg quickly became concerned with the moral depravity and illiteracy of the lower social classes, but also with the moral corruption of the rich. Therefore, he decided to devote his life to the moral reformation and education of his country's youth by establishing separate standard schools for the two social classes in Hofwyl, near Berne, as well as a school for teachers' education. The philanthropist educator formulated «an educational system more than an original theory of education»²³, which was separated in agricultural and vocational education for the poor and higher education for the upper social classes, seeking to achieve the combination of vocational education with the training of the soul and mind of the students. In general, in his educational system he applied a “political pedagogy”²⁴, with the ultimate goal being the moral rehabilitation and the delimitation of rights and obligations between the upper classes and the people.

Thus, during his first stay in Switzerland (November 1813 - October 1814), Kapodistrias seeks to get to know²⁵ the “industrial” School of Fellenberg in Hofwyl (founded in 1771), as well as the Wehrlin School (founded in 1790), through repeated visits, systematic observation and study, keeping in mind the situation and the needs of his homeland. The visit of Kapodistrias is described by Fellenberg himself in *Logios Hermes*: «The noble Count Capo-d' Istria, being in Switzerland as an ambassador on behalf of the Russian court [...] travelled in Switzerland to inspect, in this free country, the various philanthropic schools; he focused his attention more on Hofwyl, and after he had thoroughly and deeply examined what he saw there, he wanted to report to the brave and philanthropist Monarch, his Lord»²⁶.

The Capodistrian Memorandum, written in French, would get translated immediately into Russian and would be submitted in 1814 to the Tsar of Russia²⁷ and later (1820), translated into English, and it would be known all

²¹ *Ibid.*, p. 27.

²² See also the reprint of the Memorandum in Alexandra's Lambraki-Paganou book, *Kapodistria's Memorandum for the Hofwyl Schools*, Athens, Epikairoitita, 1989.

²³ *Ibid.*, p. 29.

²⁴ *Ibid.*, p. 26.

²⁵ G. Chassiotis, *L'instruction publique chez les Grecs*, Paris, 1881, p. 136.

²⁶ Koukkou, *Kapodistrias and Education 1803-1822*, A. *The Philomuse Society of Vienna*, cit., p. 26. It is also reported that the Russian monarch praised in a letter and rewarded Fellenberg with honors, but he also supported his work with a significant financial grant, *ibid.*, pp. 27-29.

²⁷ *Rapport présenté à Sa Majesté L'Empereur Alexandre, par S. Ex. Mr. le Comte de Capo d'Istria, sur les établissements de M. de Fellenberg à Hofwyl, en Octobre 1814*, à Paris, Chez J.J. Paschoud, Libraire, rue Mazarine, Nro 22 et à Genève, Chez le même, imprimeur-libraire, 1815, p. 92.

over Europe. This particular Memorandum is still of great interest today, as it is not limited to the simple description of the schools and the teaching methods which were followed by Fellenberg, but it also includes the personal views of the great political man about the education of children and «manifests all his love on this, as if he had in mind Greece and the Greek children, for the education of whom he would devote most of his life and he would expend the noblest of his efforts»²⁸.

Kapodistrias's cooperation with Fellenberg would continue as he sent Greek students to be trained there at his own expense. This initiative is also stated in a letter to the philhellenic noble Roxandra Sturtza (1786-1844), one of the most active members of the Philomuse Society of Vienna, which was founded in 1814 by Kapodistrias. He states in the letter that he sent from Vienna in May 1815: «My first adopted son has already been placed near Fellenberg. I am waiting for three more from my home country, and I intend to support the four of them at my own expenses [...]». This work would last for quite some time, as it can be understood from another letter to her²⁹, as well as from his correspondence in 1823 with the Metropolitan of Hungary-Valachia, Ignatius, in Pisa³⁰.

The need for popular education and the belief that the orientation of the lower classes towards vocational education would prevent class conflicts, thus building a fairer society, were prioritized in the design of public education in liberated Greece after the arrival of Kapodistrias (1828). He believed that he had found in those two leading Swiss educators his «pedagogical models» and the ideal educational system for the country that was ruined after the seven-year liberation struggle, but also for the care of the hundreds of children orphaned due to the war. Moreover, he wanted to give to the newly-established Greek educational system a national, Christian-centric, prudential, vocational and general character, which would involve the participation of girls in education as well³¹.

The foundation of the Orphanage on the island of Poros, which was later transferred to Aegina (1828), was a vision of «national education», for the care of 600 orphans³², who would be taught, apart from school lessons, various vocations³³; it was a fundamental task in which he gave immediate priority

²⁸ Koukkou, *Kapodistrias and Education 1803-1822*, A. *The Philomuse Society of Vienna*, cit., p. 28.

²⁹ *Ibid.*, p. 29.

³⁰ *Ibid.*

³¹ *Ibid.*, p. 36 and Lambraki-Paganou, *Kapodistria's Memorandum for the Hofwyl Schools*, cit., pp. 178-179.

³² H. Babounis, *Education during the kapodistrian period, Administrative organization and educational operation*, Athens, publ. «Syllogos pros Diadosin Ofelimon Vivlion», 1999, pp. 148-176. See also «Plan for the organization and reform of Aigina's Orphanag» (1829): A.B. Daskalakis, *Texts - Sources of the History of the Greek Revolution, Third Series, About Education*, Part One, Athens, 1968, pp. 289-300.

³³ Th. D. Chatzistefanidis, *History of Modern Greek Education (1821-1986)*, Athens, publ. Dim. N. Papadima, 1986, pp. 45-46.

after his appointment as the first Governor. Furthermore, the Standard Tiryns Farmhouse, the 120 peer-teaching schools of 10,000 pupils in the early 1831, certainly prove Kapodistrias' deep influence by the two innovative Swiss educators.

Kapodistrias had to save money and train teachers in order to be able to apply Pestalozzi's and Fellenberg's pedagogical ideas. For this reason, he was forced to maintain in schools the frugal "peer-teaching method", which was officially introduced in Greece as early as 1822³⁴.

However, Kapodistrias would not succeed in generalizing and implementing Fellenberg's welfare-educational pedagogical system, because the social, political and economic conditions that prevailed in those years in Greece were particularly unfavorable in comparison to Switzerland. The newly established, small Greek state was in a tragic situation and the insurmountable barriers of all kinds that were present in the Governor's social work were challenges that he would struggle to overcome. It should also be noted that there were reactions to Kapodistrias's work on the generalization of Education by monastic circles and by the directly affected teachers of the time³⁵.

After the Governor's tragic assassination, his welfare program for the orphans would begin to deteriorate and shrink. It has been effectively pointed out that during the Othonic period the general obligation of the State's Orphanage Committee was considered «only as an acknowledgment of their parents' national offer»³⁶.

Alongside with Kapodistrias' efforts, the great modern Greek enlightener Theophilos Kairis (1784-1853) would decide by 1826, «to dedicate himself to the upbringing of the street-wandering orphans of those who died for the faith and the homeland» and would come up with the idea of founding another Orphanage in Andros³⁷. In order to be able to collect the necessary resources for the establishment and the operation of the foundation, Kairis would travel a lot to the islands and to the mainland and he would also attract the interest and the assistance of the Governor, Ioannis Kapodistrias. However, since the necessary costs were excessive, Kairis attempted in 1832 to travel to Italy, France, England, Austria, Russia, Moldova, Valachia, Smyrna and Constantinople to request

³⁴ This method was generalized in Greek schools later, during the Kapodistrian period, on suggestion by pedagogue Ioannis P. Kokonis (1796-1864). See also Chr. Lefas, *History of Education*, Athens, publ. Organismos Ekdoseos Scholikon Vivlion, 1942, p. 121; A.M. Isigonis, *History of Education*, Athens, 1964, p. 222; L. Papadaki, The peer-teaching method in Greece in the 19th Century, Preface A. Dimaras, Foundation for Child Research, Athens, publ. Dodoni, 1992; Babounis, *Education during the kapodistrian period, Administrative organization and educational operation*, cit., pp. 206-219 and Malafantis, *The Pedagogy of the Modern Greek Enlightenment*, cit., pp. 99-100 and 180-181.

³⁵ Babounis, *Education during the kapodistrian period, Administrative organization and educational operation*, cit., pp. 448-449.

³⁶ *Ibid.*, p. 176.

³⁷ Paschalis, *Theophilos Kairis*, cit., p. 53.

assistance from the Greek diaspora. Kairis, during this trip to Europe, most probably recalling Korais's earlier prompting, «he studied the operation of the orphanages there and travelled to Hofwyl to examine the results of Rousseau's and Pestalozzi's pedagogical theories»³⁸.

Eventually, Kairis' Orphanage in Andros would be established almost ten years later³⁹, in 1835, due to financial difficulties, and it would start to operate normally by January 1836 lasting until the end of March 1839⁴⁰. It was to be a pioneering educational work for that period, which was particularly rewarding, not only for the orphans, but also for the youth of the time, to many foreigners, as well as to lay people⁴¹.

The Othonic monarchy with the regency, which followed the assassination of Kapodistrias, imposed on Greece the use of the one-way Bavarian educational system⁴², with elements from the neo-humanistic and the classicist practice of the time, leaving completely behind the movement of Charity. This trend would be reinforced as well by the Greek educators who underwent special studies in Germany during that period, as scholarship recipients of associations and bequests, who currently transferred the new pedagogical ideas to Greece.

Neither did Pestalozzi's writing have better luck in the post-revolutionary Greece, as we can see from the relevant historical-bibliographic research.

It should be noted that the oldest independent work which was written in Greek, based on Pestalozzi's educational method, is a small book of missionary publications, printed in Malta in 1836, entitled: *Teaching about the spherical table or abacus according to Pestalozzi, discovering addition and subtraction by visible objects, translated from English, for the use of the Greek nursery schools*, in Meliti 1836, 110 pages. The book describes the development of mathematical thinking in young children and the importance of understanding the concept of numbers, the mathematical concepts and geometry, which are presented to children with tangible and accessible objects. There are descriptions

³⁸ *Ibid.*, p. 55.

³⁹ D.I. Polemis, *From the Archives of Theophilos Kairis*, «The Eranist», vol. 12, 1975, pp. 221-240.

⁴⁰ G. Karas, *Theophilos Kairis - Konstantinos M. Koumas, Two pioneering teachers of the Genus*, Athens, publ. Gutenberg, 1977, p. 45.

⁴¹ See also Paschalis, *Theophilos Kairis*, cit., pp. 84-89; Karas, *Theophilos Kairis - Konstantinos M. Koumas, Two pioneering teachers of the Genus*, cit., pp. 46-50 and F.K. Voros, *The educational effort of Th. Kairis and his persecution*, «Diavazo», n. 106, 1984, pp. 27-30.

⁴² See also Th. Gotovos, *The "golden age" of pedagogical ideology and the emergence of pedagogical science: Foreign influences in Greek pedagogical theory and research*, in T. Gotovos, G. Mavrogiorgos, P. Papakonstantinou, *Critical Pedagogy and educational act*, Ioannina, publ. Syghroni Ekpaideusi, 1984, pp. 25-71; S. Bouzakis, *Didactics around Germany and its effects in Greece: A critical, interpretive approach*, in E.G. Matsaggouras (ed.), *Evolution of Didactics: Epistemological View*, Athens, publ. Gutenberg, 1995, pp. 183-192; Chr. Ir. Antoniou, *The Foundation of Pedagogy as a Science in Greece: The Evolution of Pedagogical Ideas and the Contribution of Educators*, «Teachers and Pedagogy in Greece», 2008, pp. 135-185 and A. Reble, *History of Pedagogy*, Athens, publ. D. N. Papadimas, 1996, pp. 390-405.

of methods of teaching the two numerical operations with the abacus, which are accompanied by examples of comprehension questions⁴³.

Seventeen years later, a small 68-page book written by Georgios K. Konstantinidis would be published in Athens, entitled *Lessons on physical and artificial properties of bodies as objects in the development of Ideas, According to the method of Pestalozzi*, by the Printing House of Ch. Nikolaidou, Philadelfeus, Athens, 1856. This book combines the teaching of concepts in physics with the understanding of the properties of the various physical bodies, according to Pestalozzi's supervisory teaching⁴⁴.

The Greek teachers who followed, learned Pestalozzi's pedagogical theories through their correspondingly oriented studies and through relevant references to general pedagogical works, such as the Histories of Pedagogy.

However, I must point out that a separate reference to Pestalozzi's work and educational methods exists in one of the first relevant writings, in the *Handbook of History of Pedagogy, translated and adapted by Christoforos Samartzidis, [...] Headmaster in Adrianoupolis*, Schools of Andreas Koromilas, in Athens 1883, 146 pages. In this book, whose translator makes no mention of the author's name, extensive reference is made to Pestalozzi's life and work. After the curriculum vitae and the activity of the Swiss pedagogue, the book describes in detail his pedagogical ideas, explains the teaching method that he followed and defines the child's moral, mental and physical development according to Pestalozzi. Subsequently, there is a comparison of Pestalozzi's philosophical and pedagogical concepts with those of Rousseau, and the differentiation of the famous Swiss educator from the pedagogical practices that preceded him is highlighted. Then, the pedagogical method of Pestalozzi's schools is described in detail and the report concludes with the presentation of the work of other important reformers of education, who chronologically followed the leading pedagogue (Friedrich Fröbel, Adolph Diesterweg, and others).

⁴³ We can assume that in the case of this translated version Korais's opinion mattered as well. See also note 7.

⁴⁴ It is worth mentioning here that the particularly important "pedagogical novel" *Leonard and Gertrude*, written by Pestalozzi between 1781-1787, which is considered to be one of the most important literary works produced during the Enlightenment, because it includes the author's social perceptions, but also his efforts for moral and social reformation, remained unknown to the wider Greek and educational public for many years. The book would be translated into Greek not until the middle of the 20th century by the pedagogue Evripidis S. Konstantopoulos, Deputy Director of the Maraslion Pedagogical Academy, and it would be published in Athens in 1954. See now its accessible reissue: K.D. Malafantis, *J.H. Pestalozzi, Leonard and Gertrude, A Pedagogical Novel*, Athens, publ. Poreia, 2006, pages 432. This work is considered particularly important in the pedagogical literature of the Enlightenment and its significance is also evidenced by the fact that it has received enthusiastic reception by ideologically differentiated intellectuals: by the pedagogue Michalis Papamavros but also by the pedagogue G.N. Palaiologos. See also M. Papamavros, *J.H. Pestalozzi, His life and action*, vol. A, Athens, publ. Ralli, 1929 and G.N. Palaiologos, *Ioannis-Henry Pestalozzi, His life and work*, Athens, 1953.

«A jumble of contradictions». The 1950s Italian University from the failure of the Gonella reform to the *Ten-Year Plan*

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ABSTRACT: This paper intends to reconstruct the sequence of events that affected the Italian University in the 1950s, from the Minister Antonio Segni's arrival in leading the Minerva to the issues related to the *Ten-Year Plan*. By referring to this challenging period, which has been characterized by many partial measures and by uneven reforms, the Author highlights the main problems and criticalities that have been afflicted the Italian university system.

EET/TEE KEYWORDS: History of University; History of education; Reforms of Education; Italy; XXth Century.

Set aside Guido Gonella's experience at the helm of the Ministry of Public Education with the failure of his project to reform the Italian training system¹,

¹ About Guido Gonella's role as Minister of Public Education, please see: G. Chiosso, *Motivi pedagogici e politici nei lavori dell'inchiesta Gonella (1947-1949)*, «Pedagogia e Vita», vol. VL, n. 3, 1983-1984, pp. 295-321; R. Sani, *Da De Gasperi a Fanfani: La civiltà cattolica e il mondo cattolico italiano nel secondo dopoguerra (1945-1962)*, Brescia, La Morcelliana, 1986; G. Chiosso, *I cattolici e la scuola dalla Costituente al centro-sinistra*, Brescia, La Scuola, 1988; L. Pazzaglia, *Ideologie e scuola fra ricostruzione e sviluppo (1946-1958)*, in *Chiesa e progetto educativo nell'Italia del secondo dopoguerra (1945-1958)*, Brescia, La Scuola, 1988, pp. 495-543; S. Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, Perugia, Morlacchi, 2000, pp. 21-38; G. Bertagna et alii (edd.), *Guido Gonella tra governo, parlamento e partito*, Soveria Mannelli, Rubbettino, 2007; M.R. Di Simone, *L'università italiana nella prima legislatura repubblicana: dibattiti, progetti, «leggine»*, «Annali di storia delle università italiane», vol. XXII, n. 1, 2018, pp. 43-66; 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. XXII, n. 1, 2018, pp. 67-92; Id., *Dall'università d'élite all'università di massa: luci e ombre sull'evoluzione dell'istruzione superiore nell'Italia del secondo*

De Gasperi VII Cabinet officially opened on July 26th, 1951², and registered the arrival of the Christian Democrat Antonio Segni at the helm of Minerva³. The disappearance from the scene of this man, who had led Public Education in the difficult years of post-war reconstruction, represented much more than a simple ministerial alternation: the perspective of an organic and global school renewal, which he had tenaciously cultivated and carried forward with uncertainties and difficulties during his long ministry, was lost with Gonella's farewell. From his first declarations and concrete acts, the new minister, who was destined to lead the education department in the two years before the end of the legislature, appeared particularly interested in devoting to «good administration», as well as developing scientific research, and not the future of this school reform project, so that he preferred to praise the reform and the controversies which had accompanied it with the implicit warning that he would not have certainly taken on the role of a reform minister during his ministry⁴. Segni's attitude, constantly re-proposed by his successors at least until the last phase of the decade, can be taken as a symbol of what were the school events in the 1950s. The increased ideological and political conflict characterizing this period and, at the same time, the withdrawal of centrist governments, which were far from the reformist intentions characterizing the first De Gasperi phase, as well as the slow maturation of a sort of fatalism and widespread pessimism in public opinion and school contexts about the real possibilities of a real change in the field of education after the great expectations and hopes, which had occurred between 1945 and 1950, contributed to foster a school and university policy made up of often unrelated small steps and sectoral measures, which was more careful to mainly give partial and episodic solutions to many small emerging issues than to introduce significant changes. In short, it was a school policy devoid of great impulses, ambitious intentions and far-reaching perspectives; an intervention policy which chose administrative regulations through the constant recourse to ministerial circulars and characterized by the launch of a

Novecento, in A. Ascenzi, R. Sani (edd.), *Inclusione e promozione sociale nel sistema formativo italiano dall'Unità ad oggi*, Milan, FrancoAngeli, 2020, pp. 102-128. Please see also G. Gonella, *Cinque anni al Ministero della Pubblica Istruzione*, 3 vols., Milan, Giuffrè, 1981 and G. Ignesti (ed.), *Guido Gonella: discorsi parlamentari, 1946-1973*, Rome, Chamber of Deputies, 2005.

² De Gasperi VII Cabinet remained in office from July 26th, 1951 to July 16th, 1953.

³ Antonio Segni was Minister of Public Education in De Gasperi VII Cabinet from July 26th, 1951 to July 16th, 1953 and in Pella government from August 17th, 1953 to January 18th, 1954. From July 6th, 1955 to May 19th, 1957, he became Premier, a position he will hold from February 15th, 1959 to March 25th, 1960 again. Segni will become President of the Republic on May 11th, 1962 and he will end his term of office, the shortest one of the Italian Republican history, on December 6th, 1964. About him, please see P. Marica, *Antonio Segni*, Cagliari, Fossataro, 1964; M. Del Monte (ed.), *Antonio Segni*, Rome, CEI, 1965; *Antonio Segni: dall'uomo al presidente*, Sassari, J. Webber, 2003; S. Mura, *Antonio Segni. La politica e le istituzioni*, Bologna, il Mulino, 2017.

⁴ R. Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra (1944-1958)*, Brescia, La Scuola, 1990, p. 99.

series of particular and specific legislative measures, suitably placed «under the heading of maintenance»⁵, due to the difficulties political forces met in order to give life to the hypothesis of a general school reform.

However, as underlined by Luciano Pazzaglia, the fragmentation of these measures and, conversely, the simultaneous sharpness of some problems (for example, school for young people from 11 to 14 years old or the notable and mostly “uncontrolled” quantitative expansion of the University) precisely ended up by forcefully re-proposing the urgency to renew the Italian training system through a specific legislative intervention, which proved to be organic and complete.

In this context, Fanfani II Cabinet (with Aldo Moro at the Education Department)⁶ precisely proposes the so-called *Plan for the school development in the decade from 1959 to 1969*⁷. This measure, introduced to the Senate on September 22nd, 1958, provided for the allocation of a significant funding, aimed at implementing the reforms and the organizational restructuring which the school system needed. It established that the State would have arranged financial measures for a total amount of 1,386 billion in favour of school buildings, didactic-scientific equipment, school and university assistance, funding and diffusion of nursery schools and increase in the management and teaching staff at primary and secondary schools and universities during the decade 1959-1969.

Firstly welcomed by all the political parties with confidence and moderate optimism⁸, even if it widely differed by its nature and type of approach from the school reform project prepared by Minister Gonella almost a decade before, this *Ten-Year Plan* was ideally in the wake of the directions and the reasons behind that. On this regard, we can agree with the opinion formulated by

⁵ Please see especially L. Pazzaglia, *La politica scolastica del Centro-sinistra*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-sinistra*, Brescia, La Scuola, 2001, pp. 481-495 (in particular, pp. 481-484); Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, cit., pp. 38-39; F. Bonini, *Una riforma che non si (può) fa(re). Il sistema universitario e il “Piano Gui”*, in A. Breccia (ed.), *Le istituzioni universitarie e il Sessantotto*, Bologna, Clueb, 2013, pp. 37-49 (in particular, pp. 37-38).

⁶ Moro was minister in Fanfani II Cabinet from July 1st, 1958 to February 15th, 1959. Fanfani II Cabinet succeeded to Adone Zoli government after the political elections in 1958.

⁷ About the *Ten-Year School Plan*, please see T. Codignola, *Nascita e morte di un Piano*, Florence, La Nuova Italia, 1962 (the full text of the *Plan* is shown in the appendix); L. Ambrosoli, *La scuola in Italia dal dopoguerra ad oggi*, Bologna, il Mulino, 1982, pp. 85-96; Chiosso, *I cattolici e la scuola dalla Costituente al centro-sinistra*, cit., pp. 185-193; Pazzaglia, *La politica scolastica del Centro-sinistra*, cit., pp. 481-485; Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, cit., pp. 51-74; S. Salustri, *L'Università in Italia (1945-1970), Il quadro istituzionale*, in D. Bruni et alii (edd.), *Dallo schermo alla cattedra. La nascita dell'insegnamento universitario del cinema e dell'audiovisivo in Italia*, Rome, Carocci, 2016, pp. 27-36.

⁸ Please see *Il Piano decennale*, «La Scuola e l'Uomo», 8-9 August 1958, p. 2; G. Gozzer, *Sviluppo e scuola nel Piano decennale*, Rome, Edizioni Uciim, 1959; M. Gliozzi, *Il piano di sviluppo della scuola*, «Il Ponte», vol. XV, n. 11, 1959, pp. 1367-1376; *L'Associazione italiana Maestri Cattolici dal 6° al 7° congresso nazionale 1959-1962*, Rome, So.Gra.Ro., 1962.

Giorgio Chiosso, according to who, «even Fanfani-Moro project considered the development of education in terms of social justice and enhancement of all the available human resources»⁹, like 1951 legislative decree no. 2100. Beyond the undeniable elements of continuity with Gonella project in 1951, what appears more relevant in our opinion is that the *Plan* proposed by Fanfani II Cabinet relaunched the perspective of an overall structural reform of education and school, which took place through Parliament and, above all, was supported by a precise economic planning. It reflected the affirmation of a «planning culture» within the political class, by virtue of which the State was called to lead the great moments of a socio-economic transformation in Italy. In the light of this process, which would have been assumed by the following centre-left governments with further conviction, «school ceased to be independent in order to become an element of a wider system, where various factors, from the economic ones to more properly training ones, interacted»¹⁰.

In reality, this *Ten-Year Plan* stood out from the reform measures previously launched, as it was concerned with preliminarily determining the context of the allocations and the economic-financial measures within which the provisions concerning the reorganization of several school areas and fields should have been included. In fact, according to the legislator, the spending plan should have been linked with other legislative measures, which were able to carry out the structural reforms and the renewal of programs.

So, the hypothesis of an organic reform intervention in the field of education, put aside with the failure of Gonella reform, forcefully returned to the heart of the political parliamentary debate, involving both the government and the opposition forces in the decisive common acknowledgment of the need to activate productive investments, as well as a serious school policy initiative as a condition which could no longer be postponed for the overall growth of Italian society and, even, the improvement of the living conditions of citizens.

Higher education and university sectors particularly needed this overall organic reform work. The above-mentioned season, which the school historiography during the second post-war period defined as the «administrative» school and university management, when the possibility of obtaining consensus on a global and far-reaching reform of the Italian education and training system was made uncertain – due to the radicalization of the ideological and political clash among the parliamentary forces who supported the government majorities –, had led the people in charge of Public Education to also focus on minor partial measures with reference to the university world, in order to especially avoid the dangers of a parliamentary confrontation, whose outcomes did not appear obvious¹¹. If

⁹ Chiosso, *I cattolici e la scuola dalla Costituente al centro-sinistra*, cit., p. 188.

¹⁰ Pazzaglia, *La politica scolastica del Centro-sinistra*, cit., p. 483.

¹¹ Please see Pazzaglia, *Ideologie e scuola fra ricostruzione e sviluppo (1946-1958)*, cit., pp. 513-515. On this regard, by focusing on the school situation of that period, Marzio Barbagli underlined: «The difficulty which political forces encountered in coagulating around the hypothesis

this *modus operandi* had aroused bitterness and disturbance among those who had shared and supported the reform aspirations in the previous phase on the one hand, it had restored vigour to corporate and local pressures, which were often in clear contrast with the needs of an organic and rational expansion of the Italian higher education system on the other hand¹². Hence, both strictly connected to the political pressures acted by local ruling classes¹³ and animated by the desire to tackle the overcrowding problem of the major universities through a policy of decentralization, which was badly reconciled with the particular and singular Italian academic geography¹⁴, the concern which most inspired the holders of the Education Department in the 1950s was, above all, that of focusing on the often wild and irrational development of new faculties and, especially, new universities throughout Italy, which was never guided by an overall organic plan, even in this case¹⁵.

of a general school reform ended up favouring that tendency of the Italian school policy once again: since the first years after the Unification, it preferred to rely on administrative regulations [...] through ordinances and circulars» (See M. Barbagli, *Disoccupazione intellettuale e sistema scolastico in Italia*, Bologna, il Mulino, 1976, pp. 391-392).

¹² Please see U.M. Miozzi, *Lo sviluppo storico dell'Università italiana*, Florence, Le Monnier, 1993, pp. 152-166.

¹³ On this regard, please see R. Semenza, *Una proliferazione eccessiva dell'offerta formativa?*, in M. Regini (ed.), *Malata e denigrata. L'Università italiana a confronto con l'Europa*, Rome, Donzelli, 2009, pp. 19-30 (in particular, pp. 20-21).

¹⁴ About the Italian academic geography, firstly see the interesting contribution by M. Moretti, *Sulla geografia accademica nell'Italia contemporanea (1859-1962)*, in L. Bianco, A. Giorgi, L. Mineo (edd.), *Costruire un'Università. Le fonti documentarie per la storia dell'Università degli Studi di Trento (1962-1972)*, Bologna, il Mulino, 2011, pp. 59-100. In 1952, Mario De Luca, a full professor of Political Economy at the University of Catania, argued that «now the university distribution in Italy is very irrational like all the things responding to the environmental conditions which are now exceeded; and my South mainly suffers from this irrationality» (see M. De Luca, *Una nuova università a L'Aquila!*, «Il Giornale dell'Università. Organo degli atenei d'Italia», vol. 2, n. 9-10, 1952, p. 185. An emblematic case of incorrect and not very functional university territorial distribution was represented by the Marche, a region where there were three universities (Macerata, Camerino, Urbino) with a minimum number of faculties and schools at least until the late 1950s; this meant that this territory was in second place in Italy, immediately after Emilia-Romagna, in terms of the number of universities on the one hand and gave it a sort of «primacy» with reference to the percentage of higher education institutions in relation to the population on the other hand. On this regard, please see L. Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratese tra Otto e Novecento*, Macerata, eum, 2013 (in particular, pp. 257-260).

¹⁵ In addition to what has been mentioned about the university policy in this period so far, also see Luzzatto, *L'Università*, in G. Cives (ed.), *La scuola italiana dall'Unità ai nostri giorni*, Florence, La Nuova Italia, 1990, pp. 153-198; G. Marsiglia, *L'Università di massa: espansione, crisi e trasformazione*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, 2 vols., Bologna, il Mulino, 1993, Vol. I, pp. 129-168; G. Capano, *La politica universitaria*, Bologna, il Mulino, 1998; G. Luzzatto, *2001: l'odissea dell'università nuova*, Milan, La Nuova Italia, 2001; A. Graziosi, *L'Università per tutti. Riforme e crisi del sistema universitario italiano*, Bologna, il Mulino, 2010, pp. 35-52; L. Governali, *L'università nei primi quarant'anni della Repubblica italiana, 1946-1986*, Bologna, il Mulino, 2018, pp. 21-66.

However, this context was even more complex. In fact, the real problems of Italian Universities were also and above all others, mostly regarding their structural nature, which have been already well evident for some time. Especially, with the post-war development of Italian society around the late 1950s, the University had revealed clear signs of crisis, because it was no longer able to give adequate answers to the strong demands of social mobility emerging in the country or the need to modernize knowledge resulting from the significant growth of technical-scientific culture and the rapid industrialization of a country which, moreover, needed a substantial number of graduates, especially in scientific fields. Thus, forced by events, the University ended up being involved in a process of change which was largely related to the evolutionary process affecting society in a rapid and chaotic development, according to complex and contradictory parameters. For example, this meant that substantial uncertainty reigned in universities and was well represented by the weak and ambiguous law of March 18th, 1958, n. 311, which imposed on professors the (not sanctioned and largely disregarded) obligation «to give weekly lessons in no less than three different days», in addition to reiterating «freedom of teaching and scientific research», without establishing a minimum time commitment for teaching beyond a deliberately generic «as many hours per week as the nature and the extent of teaching itself require». As Andrea Romano's words effectively explain, Italian university was a jumble of contradictions, which was unable to face the new challenges posed by contemporary society:

Curricula, which were plastered and inadequate to different realities, obsolete and poorly effective teaching forms, insufficient structures, high relationship between professors and students, low attendance and professors, who often considered teaching (and, also, research) a marginal commitment, even if it was indispensable because it was relevant and involving substantial economic or patronage repercussions, made the Italian university system globally unsatisfactory and scarcely productive, albeit excellent in some sectors and *élites* as, for example, evidenced by the significant number of students who had failed to take their degree in the time prescribed: 37% on all the people enrolled in the academic year 1950-51, while the ratio between enrolled people and graduates in the same year was less than 10%. An apparently fierce selection which did not always find justification in the quality and the correct rigor of studies¹⁶.

Thus, if there was the strengthening of a privileged position for professors' corporation (justified with a continuous recourse to freedom and autonomy for teaching and university research), who was increasingly closed in their own ivory tower and not caring of a changed social reality on the one hand, the need to become aware of the affirmation of an increasingly consistent propensity towards expansion within the student population was worsening and

¹⁶ A. Romano, *A trent'anni dal '68. "Questione universitaria" e "riforma universitaria"*, «Annali di storia delle università italiane», vol. II, 1998, pp. 9-35.

determined by the widespread difficulty to find a job for young graduates¹⁷, the hope to economically improve and more easily access to prestigious professions and offices, the students' desire for a social transit on the other hand.

For example, the sense of a widespread unease and the increasingly urgent need for a rapid and not superficial change were well expressed both in official documents, such as the report by *Il Comitato di studio sui problemi dell'università italiana*, a result of the consistent debate developed during the seminar promoted by "il Mulino" in Bologna and then published in 1961¹⁸, and many conferences and seminars organized both outside and inside university or on the pages of the most widespread and relevant school-educational magazines of the time¹⁹.

As already mentioned, precisely with a view to an overall reform intervention of the entire national training system, including higher education, the Minister of Public Education Aldo Moro had introduced to the Senate the legislative decree no. 129 concerning the *School Development Plan in the decade from 1959 to 1969* on September 22nd, 1958. Fanfani government fell at the beginning of the following year and Moro's successor, Giuseppe Medici, who would have held the ministry from February 1959 to July 1960, expressed his desire to carry out this provision and undertook to defend its main operational guidelines in the face of the criticisms and reservations raised by left-wing oppositions and secular and progressive school environments inside and outside Parliament²⁰. Beyond the undeniable identification of a greater financial effort, the main criticisms for that *Plan* were based on the fact that this provision did not seem to define the basic goals and the guiding criteria for a school reform in a clear and precise way to the point that, «far from encouraging the desired renewal, the resources allocated would be ultimately used to consolidate the system in force or to launch completely insufficient solutions, as in the case of schools for young people from 11 to 14 years old», as observed by the detractors of this *Plan*²¹.

¹⁷ Barbagli, *Disoccupazione intellettuale e sistema scolastico in Italia*, cit. and C. De Francesco, P. Trivellato, *La laurea e il posto. Istruzione superiore e mercato del lavoro in Italia e all'estero*, Bologna, il Mulino, 1978.

¹⁸ For example, the problems connected to the university crisis were the subject of a consistent debate held both within ANPUR and «Comitato di studio dei problemi dell'Università italiana», who promoted an *ad hoc* seminar with "il Mulino" in Bologna in 1960 (the acts were published with Ford Foundation contribution in 5 volumes of *Studi sull'Università italiana*, Bologna, il Mulino, 1961).

¹⁹ In 1960, PSI published a booklet in *Politica scolastica ed amministrazioni locali*. It should be noted that very active magazines, such as «Riforma della scuola» (with a communist orientation) and «Scuola e città» (with a socialist orientation), seats of lively debates on the whole "school question", including university education, were precisely born in the first five years of the 1950s.

²⁰ About this topic, please see in particular: G. Canestri, G. Ricuperati, *La scuola in Italia dalla legge Casati a oggi*, Turin, Loescher, 1976, pp. 254-259 and Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, cit., pp. 51-52.

²¹ Pazzaglia, *La politica scolastica del Centro-sinistra*, cit., p. 484.

However, despite these criticisms, at least initially, the parliamentary *iter* of the legislative decree no. 129 encountered no serious obstacles. In fact, although amended in several points²², in December 1959, it managed to obtain approval in the Senate and was, therefore, sent to the Chamber of Deputies, where it was subjected to an initial examination between the winter and the spring in 1960. However, in May 1960, the debate on this *Plan* came to a standstill after the serious political crisis which occurred the day after the approval of Tambroni government, supported with the votes of the neo-fascist right wing²³. Due to these events, the discussion of this provision in the Chamber could only resume in 1961 in a context which had deeply changed: in fact, Tambroni was succeeded by Fanfani III Cabinet (July 1960-February 1962) and Minister Medici was replaced by his fellow member of the party Giacinto Bosco²⁴. After the unfortunate collaboration with the right-wing forces, the new executive chaired by the statesman from Arezzo proposed itself as a transitional government towards the centre-left. The so-called policy of “parallel convergences” was being inaugurated, that is, the start of that laborious political process through which the new secretary of the Christian Democrat Party, Aldo Moro, would have led his party to the alliance of government with Pietro Nenni’s socialists in a few years²⁵.

In this context, the slow and quiet parliamentary course of the *Ten-Year Plan* underwent a decisive turnaround. In fact, when the debate resumed in the Chamber in 1961, the left-wing parties showed a much more rigid and polemical attitude towards the legislative decree than the one previously held, «not failing to underline that an agreement on school policy between the majority and the opposition in Parliament would have been only possible in the event that the government had proceeded to withdraw and to set aside the provision under discussion»²⁶. The socialist Tristano Codignola²⁷, who introduced a long and precise report written by minority to the Chamber of Deputies on May 25th, 1961, was the spokesperson for this strong side-taking²⁸:

²² Please see especially Ambrosoli, *La scuola in Italia dal dopoguerra ad oggi*, cit., pp. 85-108.

²³ About the serious political crisis which opened the day after the establishment of Tambroni government, please see G. Mammarella, *L'Italia contemporanea*, Bologna, il Mulino, 1993, pp. 261-274.

²⁴ Giacinto Bosco, a full professor of International Law, was Minister of Public Education from July 26th, 1960 to February 21st, 1962.

²⁵ About the political events of this period, please see the valid works by G. Tamburrano, *Storia e cronaca del centro-sinistra*, Milan, Feltrinelli, 1971; N. Kogan, *L'Italia del dopoguerra. Storia politica dal 1945 al 1966*, Rome-Bari, Laterza, 1977 and P. Di Loreto, *La difficile transizione. Dalla fine del centrismo al centro sinistra*, Bologna, il Mulino, 1993.

²⁶ Sani, *La politica scolastica del Centro-Sinistra (1962-1968)*, cit., p. 54.

²⁷ About this socialist exponent and his school political orientations, please see in particular Tristano Codignola *e la politica scolastica in Italia (1950-1975)*, Rome, Editori Riuniti, 1984 and T. Codignola, *Per una scuola di libertà. Scritti di politica educativa (1947-1981)*, Florence, La Nuova Italia, 1987.

²⁸ Parliamentary Acts, Chamber of Deputies, on June 13th, 1961, *Relazione della VIII*

Codignola declared: – After more than 32 months from its introduction, it (the *Plan*) no longer seems only to hold that ‘transcendent’ importance – which was firstly attributed to it – but the gaps, the contradictions and the dangers characterizing it now appear in such a clear light that it is impossible for it to be accepted by the left wings, and the opportunity for support by the parties, who contribute to ensure the majority in the government, is doubtful²⁹.

According to the socialist deputy, some serious deficiencies and significant problems, which emerged from a careful analysis of this provision and were highlighted «by various political parties, including some sectors of the Catholic movement», categorically prevented the approval of this *Plan*. Firstly, Codignola underlined that this *Plan* lacked the main elements characterizing this type of provisions, missing «adequate economic and educational development expectations which justify it», nor were there precise indications about its financial coverage, that is, regarding the modalities to find the annual allocations necessary to achieve its goals. In the government text, Codignola also noted the total absence of mechanisms which would have guaranteed that the planned investments would have really been «extraordinary and certainly additional» compared to the current ordinary investment in education expenditure: effectively, the *Plan* was uncertain about its intrinsic ability to be a real «turning point» with respect to the allocations traditionally destined to schools within the framework of a state budget. The minority rapporteur’s judgment was very hard on what he called the «technical structure» of the *Plan*, that is the connection between financial allocations and reform provisions. These substantive provisions, which were introduced or announced, appeared to be completely unrelated to an organic school reform and the lack of a similar link between expenditure and reforms risked nullifying any intention to structurally renew the training system. Finally, further reasons for dissatisfaction with this *Plan* were to be sought both in its long-term nature, which would have paradoxically ended up favouring the traditional restrictive policy of the Treasury Ministry, who was certainly able to oppose the massive investments necessary to fill the backward school needs at the first opportunity, and in its insufficiency from a quantitative point of view, since the considerable financial effort which this *Plan* required would not have made it possible to adequately meet the ever-growing needs of education, according to the Socialist deputy.

The part of Codignola’s report devoted to higher education is particularly interesting for the purposes of our discussion, not so much with reference to the identification of the criticalities which can be found in the lack of financial interventions provided for university matters by the provision³⁰, but in the

Commissione Permanente sul disegno di legge approvato dal Senato della Repubblica nella seduta del 9 dicembre 1959, presentata alla presidenza il 25 maggio 1961 dal relatore di minoranza Tristano Codignola, n. 1868 A bis.

²⁹ *Ibid.*, p. 3.

³⁰ *Ibid.*, pp. 84-98.

precise and realistic description which the socialist deputy offered about the poor Italian university³¹. Taking as a starting point the document published by the associations of professors (ANPUR), assistant lecturers (UNAU) and students (UNURI) on the occasion of the «University Day», held on January 27th in that year, where they sought to awaken «the most sleepy and distracted part of public opinion about the dramatic nature of the university crisis and the repercussions which are about to derive from it for the whole country, its economic and cultural development, its ability to adapt to scientific research rhythm and level and the new ruling classes' training»³², Codignola bluntly reproached the Italian political class of the last decade for having been made aware of this difficult situation in higher education, but they had faced it only through provisions where «the [...] uncertain and inorganic signs of approximation and carelessness are impressed everywhere», totally lacking any farsighted perspective. Hence, the «indisputable and incontestable» responsibility of the political ruling class, who was unable to understand the simple fundamental equation «school in crisis means country in crisis», according to the socialist speaker:

But this equation is particularly true and immediate for the University. In fact, the University is not only the place where the future managers, professionals, researchers and scientists are trained and from whose qualitative and quantitative validity will substantially derive the development of the future Italian society, but it is also the place for training teachers, on who the efficiency and the orientation of the entire primary and secondary school, which will foster the future University in 10 or 15 years, will depend – in a circle from which one cannot escape –. Therefore, all the reasons for the current and potential crisis of a school structure are to be found in the University and all the unresolved knots of civil society explode there in a more open way.

Therefore, after examining the seriousness of the Italian university situation from a purely quantitative point of view (disproportion between the number of the students enrolled and the number of professors, inorganic and inappropriate university territorial location, unbalanced relationship between Faculties of Humanities and technical-scientific ones with an obviously numerical superiority of the former, evident lack of lecture rooms and adequate building structures), the socialist deputy especially dwelt upon the obsolescence of didactic systems and the problems of morality which have chronically afflicted Italian universities for too long.

³¹ Please see F. Catalano, *I movimenti studenteschi e la scuola in Italia (1938-1968)*, Milan, Mondadori, 1969, pp. 328-329.

³² Parliamentary Acts, Chamber of Deputies, on June 13th, 1961, *Relazione della VIII Commissione Permanente sul disegno di legge approvato dal Senato della Repubblica nella seduta del 9 dicembre 1959, presentata alla presidenza il 25 maggio 1961 dal relatore di minoranza Tristano Codignola*, n. 1868 A bis., cit., p. 85 and the following ones.

About the first question, Codignola underlined how the contradiction between Italian university teaching systems and the function which was required to the university at that precise moment was increasingly conflicting:

The professorial lecture to hundreds or even thousands of students, the individualism of a single chair or an Institute exclusively connected to a chair and the quantitative organization of exams are all residues of a past time, which cannot correspond to the features of a modern teaching in any way, based on teamwork, constant presence of professors and personal relationship between professors and young people³³.

Hence, the urgent need «of a multiplication of different professors», «a massive increase in assistant lecturers in line with the number of attending students», «a connection of several teachings in institutes with more chairs», «a coexistence of more chairs for the same disciplines (to also ensure a dialectic of teaching indispensable for the development of studies)» and «an autonomous collective decision of each university in the preparation of study plans and groupings of chairs outside [...] rigid and predetermined regulations», according to Codignola.

According to the Socialist deputy, the problems linked to malpractice in Italian universities and those «pathological processes born from legislative, financial and functional university insufficiency», which saw full professors as negative protagonists, because they were «anchored in the defence of absurd and inconceivable privileges in a democratic society», had much more complex solutions³⁴.

The questions of the professor's *full time*, the accumulation of professional or political activity with teaching, the university residence and the regularity of lectures, the hoarding of positions by holders, the feudal nature in the position of the 'leader of a school' compared to assistant lecturers and students and the Camorra phenomena denounced in the current organization of competitions and the mechanism of free teaching are problems which remain at the level of a simple moralistic complaint, without the possibility of a substantial solution, if we do not propose to solve them, firstly by making use of legislative and financial interventions in order to eliminate the objective conditions which can be used as a pretext for university malpractice³⁵.

Therefore, in a short time, the Italian ruling class was called to be interested in this University, which was very weak and even «dying» and would not have benefited from a massive financial effort («which would have risked

³³ *Ibid.*, p. 89.

³⁴ Catalano, *I movimenti studenteschi e la scuola in Italia (1938-1968)*, cit., p. 329.

³⁵ Parliamentary Acts, Chamber of Deputies, on June 13th, 1961, *Relazione della VIII Commissione Permanente sul disegno di legge approvato dal Senato della Repubblica nella seduta del 9 dicembre 1959, presentata alla presidenza il 25 maggio 1961 dal relatore di minoranza Tristano Codignola*, n. 1868 A bis., cit., p. 90.

strengthening and stiffening the current structure»)³⁶ without the appropriate and incisive structural reforms, by means of a serious and organic programming and planning intervention, which seriously took into account the requests coming from various ambits.

However, this intervention could not be identified in this *Ten-Year Plan*. In fact, numerous criticisms and reservations expressed by left-wing oppositions and many members of the government majority³⁷ towards this *Plan* had now widely demonstrated that it would not have found the approval of Parliament, if it had been structured in this way. Thus, just as the debate, which had accompanied the long parliamentary *iter* of this provision, was now coming to an end with a predictable negative outcome, MP Fanfani, who had taken his place on the occasion of the introduction of his new government to the Chamber (on February 21st) in the meantime, having fallen the executive he chaired in February 1962, announced the decision to withdraw the legislative decree relating to this *Ten-Year Plan*. Any organic intervention on the Italian training system, including University, had to be postponed to another more favourable occasion. Thus, almost all the Italian political forces were aware that this overall plan of school reform was no longer postponable³⁸.

³⁶ Bonini, *Una riforma che non si (può) fa(re). Il sistema universitario e il "Piano Gui"*, cit., p. 38.

³⁷ On this regard, please see L. Pedrazzi (ed.), *Iniziative di governo e problemi della scuola secondaria*, Bologna, il Mulino, 1959 (which reproduces the contributions introduced at the friends and collaborators' IV conference of "il Mulino", held in Bologna from 29th to 30th November 1958); V. Sinistrero, *Il Piano decennale per la scuola*, «Orientamenti pedagogici», vol. VI, 1958, pp. 972-986; G. Giampietro, *La "battaglia" per la libertà della scuola*, «Docete», vol. IV, 1958-1959, pp. 207-211.

³⁸ About the university policies implemented by the centre-left in the 1960s, in addition to the texts already mentioned in this work, please also see the current L. Pomante, *L'Università italiana alla vigilia del Sessantotto. Tra il riformismo del centro-sinistra e la rivolta studentesca globale*, in M. Bocci, M. Busani (edd.), *Towards 1968. Studenti cattolici nell'Europa occidentale degli anni Sessanta*, Rome, Studium, 2020, pp. 234-258.

The political thought of *Vamba* in the context of early 20th-century Italy: civic-ethical commitment and the project of educating new generations in citizenship

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ABSTRACT: This contribution analyses the concept of nation elaborated and promoted by Luigi Bertelli (*Vamba*), with particular reference to his works for children and youth. In the early twentieth-century Italian cultural context, he was an important protagonist among the intellectual-patriots aiming to follow up the process of unification of the peninsula through the complete definition of a national identity. *Vamba* articulated and promoted a project of education in citizenship addressed to the new bourgeois generations, involving the recovery of the myths of the Risorgimento and the faith in the fathers of the country, which was always presented in a direct, irreverent and never boring style. Although using different means, Bertelli's project flanked the one promoted through official educational channels, in providing the substratum of traditions and common values in which his audience could finally recognise themselves as Italian citizens.

EET/TEE KEYWORDS: Luigi Bertelli (*Vamba*); National identity; Citizenship education; Children's literature; Children's periodical press; XIXth-XXth Centuries.

1. *Luigi Bertelli and his participation in the Italian political and civil debate at the beginning of the 20th century*

Among the fundamental influences on the multifaceted and conspicuous works of Luigi Bertelli¹, better known by his pseudonym *Vamba*, were his

¹ Although exhaustive citation of the vast and well known bibliography on Luigi Bertelli would be impossible, some specific references deserve note: G. Cavaciocchi, *Vamba*, «La Gazzetta Livornese», Livorno, 28 November 1920; C. Paladini, *Vamba*, «Il Nuovo Giornale», Florence, 28

political interests and his intense participation in matters of public interest. In the cultural context of the early twentieth century, with the deep divide that had developed over the Giolittian era between the governmental and intellectual components of the country, Bertelli entered the polemical current against the “products” of political positivism. In doing so, he joined the ranks of those patriotic men of letters, who to combat the authoritarianism, transformism² and conformism of the times, promoted the reformation of society’s moral conscience in a manner that would exalt the civil commitment and community effort of the new generations, achieving both cultural and social change, and above all the realisation of a true conception of a fully Italian nation.

Bertelli and other compatriots intellectuals viewed the cultural sphere as the ideal environment for the «rebirth of intellectual and moral energies», and at the same time as the laboratory for developing technical solutions and scientific skills that would serve in forming a new social awareness, rising to a fully nationalistic vision, applicable in the resolution of critical public issues and problems³.

Despite the onset of industrialisation and the growing affirmation of the proletarian and bourgeois classes, the emergence of the peninsula from its preceding fragmented condition had left the masses still without a common tradition. The profound territorial imbalances continued, and more importantly the social ones. Moreover, in Italy, the inauguration of a new political season,

November 1920; Yambo, *Vamba, l'amico dei bambini*, «La Nazione», Florence, 28 November 1920; M. Adami, *Vamba: per l'opera sua*, «Arena», Verona, 30 November 1920; G.E. Nuccio, *Vamba*, «I Diritti della Scuola», Rome, 4 December 1920; U. Fleres, *Vamba*, «Nuova Antologia», Rome, 15 December 1920; G.E. Nuccio, *Necrologio di Vamba*, «Il Giornalino della Domenica», Florence, 19 December 1920; G. Fanciulli, E. Monaci Guidotti, *La letteratura per l'infanzia*, Turin, SEI, 1942; P. Bargellini, *Tre toscani: Collodi, Fucini, Vamba*, Florence, Vallecchi, 1952; M. Mencarelli, *Vamba e due parole sulla letteratura per l'infanzia*, Florence, Bemporad Marzocco, 1952; L. Nissim Rossi, *Vamba (Luigi Bertelli)*, Florence, Le Monnier, 1954; P. Hazard, *Letteratura infantile*, Milan, Viola, 1954; C. Portanova, *Vamba (Luigi Bertelli)*, Pozzuoli, Conte Editore, 1957; G. Fanciulli, *Scrittori e libri per l'infanzia*, Turin, SEI, 1960; A. Lugli, *Storia della letteratura per l'infanzia*, Florence, Sansoni, 1960, *ad indicem*; L. Sacchetti, *Storia della letteratura per ragazzi*, Florence, Le Monnier, 1962, *ad indicem*; A. Michieli, *Vamba*, Brescia, La Scuola, 1965; M. Barsali, *Bertelli Luigi (Vamba)*, in *Dizionario Biografico degli Italiani*, Rome, Istituto della Enciclopedia Italiana, 1967, Vol. IX, pp. 494-499; A. Faeti, *Letteratura per l'infanzia*, Florence, La Nuova Italia, 1977, *ad indicem*; R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 1997, *ad indicem*; M. Colin, *L'âge d'or de la littérature d'enfance et de jeunesse italienne*, Caen, Presses Universitaires de Caen, 2005; P. Boero, C. De Luca, *La letteratura per l'infanzia*, Rome-Bari, Laterza, 2006, *ad indicem*; A. Ascenzi, *Bertelli Luigi*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionario Biografico dell'Educazione (1800-2000)*, 2 vols., Milan, Editrice Bibliografica, 2013, Vol. I, pp. 147-148.

² On this subject see, for example, S. Rogari, *Alle origini del trasformismo: partiti e sistema politico nell'Italia liberale 1861-1914*, Rome-Bari, Laterza, 1998.

³ On the development of the profound split between intellectuals and the political class over the late nineteenth and early twentieth centuries, and in particular on the criticism of the Giolitti government, see especially the chapter *Intellettuali, politica e «questione nazionale»*, in G. Chiosso, *L'educazione nazionale da Giolitti al primo dopoguerra*, Brescia, La Scuola, 1983, pp. 5-34.

marked by strong nationalist, democratic and socialist impulses, had provoked growing hostility towards the liberal state and the decline in the prestige of parliamentary institutions.

In the first half of the twentieth century, therefore, the development of a *national* society proceeded unevenly, since alongside improvement in the economic, scientific and cultural areas, the burdensome legacy of the past would continue to slow the country's growth in production and render the process of civil maturation unstable⁴.

This complex range of historical and political circumstances composed the background to *Vamba's* production, and had a decisive influence on the elaboration of his political reflection, and consequently also on the selection of the spheres of intervention and the intended audiences for his work. In an initial phase, the Florentine author engaged primarily in "adult" journalism, particularly in writing polemical and humorous articles intended to denounce the behaviour of the political class. Following the publication of *Ciondolino* in 1893⁵, he decided to devote himself to literature for children and young people, and to the education of the younger generations. His early experience had disillusioned *Vamba*, owing to the general dullness of public opinion and the incompetence and unreliability of the ruling class in the late nineteenth century. The author went through a period of intense introspection, after which he chose to turn his attention and teachings to those who had the power to really change the destiny of this "new-born" Italy, without ever giving up his satirical and irreverent tone of writing⁶.

⁴ Following the defeat at Adua and the definitive fall of the Crispi government, his successor, Rudinì, advanced a renewed liberal-conservative political project. The deepening economic crisis, however, provoked even stronger social unrest, demonstrating the fact that, in reality, this unrest originated from transitory causes, and that although specifically linked to political matters – such as the spread of the new Catholic and socialist currents – it was mostly an expression of the need to improve social conditions. The violent repressions on behalf of government demonstrated the inability of the liberal ruling class to understand the real motivations behind the popular uprisings, and their timidity in the face of potential internal insurrections. In these conditions, the gap between the country's governmental and social components would continue to grow. For a complete historical-political reconstruction of the crisis of Italian liberalism and the post-unification Italian political context, see in particular: V.G. Pacifici, *Francesco Crispi (1861-1867). Il problema del consenso allo Stato liberale*, Rome, Edizioni dell'Ateneo, 1984; the first two parts of E. Gentile, *La grande Italia*, Rome-Bari, Laterza, 2009, pp. 5-154; Id., *Le origini dell'Italia contemporanea. L'età giolittiana*, Rome-Bari, Laterza, 2011.

⁵ This novel, in the genre of science popularisation, was first published by Enrico Bemporad, with whom Bertelli formed bonds of deep esteem and friendship, as well as strong professional association. As well as the whole first period of «Il Giornalino della Domenica» (1906-1911), Bemporad also published many of *Vamba's* other works of children's literature – among which *La storia di un naso* (1906), the well-known *Il giornalino di Gian Burrasca* (1912), *Cinematografo poetico*, *Le scene comiche* (1913), and *I bimbi d'Italia si chiaman Balilla. Ragazzi italiani nel Risorgimento nazionale* (1915).

⁶ The opening pages of *Ciondolino* include *Vamba's* emblematic dedication to readers: «I thought, children, to make you see many great things in small beings... Later, in this world, you

It was in pursuit of an internal need that the author pursued «the formation of a new civic-ethical conscience in the young generations, in the spirit of that political pedagogy, so dear also to his idol Giuseppe Mazzini and to the great men of the Risorgimento»⁷. In taking this personal approach, Luigi Bertelli would pursue the double conception of educative-civic pedagogy, befitting the renewed bourgeois cultural conception of the early 20th century, and above all the Italian nationalist conception. In line with the impulses of the Risorgimento and with the processes of democratisation and social mobilisation, Bertelli felt it was necessary to intervene directly on the boys, girls, young men and women who would compose the future society and ruling class. What was needed was the development of a true education in the *new* Italian citizenship, developed first of all through the recovery of traditions and the development of a collective national memory⁸.

The Florentine writer therefore advocated the promotion of a sense of nationality which, using the words of the historian Federico Chabod⁹, could be conceptualised as «a sense of historical individuality», or as an individual and *particular* principle, capable of recognition in comparison to others, rather than as a generalising and universalising conception. For double purposes, therefore, *Vamba* would exalt the national myth and the glorious birth of the Reign of Italy, as an instrument of ethical inspiration and political model for the formation of Italian citizens, yet also as the starting point of the process of civil liberation for the entire nation.

The balance sheet of the first fifty years of unity was certainly sufficient to strengthen the faith of the «believers» in the myth of a Great Italy¹⁰, including Bertelli himself, while also providing them with the necessary educational contents for their new project of integrating the population with the institutions of the new unitary state. The promotion of a spirit of national pride, moreover, entailed abandonment of the mere recovery of Roman pomp and circumstance, and instead favoured advancement of the actions and the new bourgeois ethics of the early century, already marked by progressive acquisition of public awareness and the start of national processes of modernisation.

will see many small things in large beings».

⁷ A. Ascenzi, M. Di Felice, R. Tumino (edd.), «Santa Giovinezza!». *Lettere di Luigi Bertelli e dei suoi corrispondenti* (1883-1920), Macerata, Alfabetica Edizioni, 2008, p. 17.

⁸ For an in-depth look at the theme of collective memory, see: B. Anderson, *Imagined communities: reflections on the origin and spread of nationalism*, London-New York, Verso, 1983; M. Halbwachs, *La memoria collettiva*, ed. by P. Jedlowski, Milan, Unicopli, 1996; M. Isnenghi (ed.), *I luoghi della memoria. Strutture ed eventi dell'Italia unita*, Rome-Bari, Laterza, 1997; P. Ricer, *La mémoire, l'histoire, l'oubli*, Paris, Éditions du Seuil, 2000; G. Bellelli, D. Bakhurst, A. Rosa (edd.), *Tracce: studi sulla memoria collettiva*, Naples, Liguori, 2000; C. Yanes Cabrera, J. Meda, A. Viñao (edd.), *School memories: new trends in the history of education*, Cham, Springer, 2017.

⁹ On this subject, see mainly F. Chabod, *L'idea di nazione*, Bari, Laterza, 1967.

¹⁰ Cf. Gentile, *La grande Italia*, cit., p. 11.

2. Vamba's conception of national identity: from its roots in the Risorgimento to the Fiume's initiative

The correct placement of Luigi Bertelli's thought in the broader Italian political and cultural context of the early twentieth century requires consideration of his own upbringing in the midst of the fervent social and political climate that preceded the birth of the new Reign of Italy. Given this, we can understand the development of his deep-rooted adoration for the myths of the Risorgimento, and above all, for the great protagonists of national unity. The recovery of national unity had been essential to the identification and definition of the specific features of Italian civil identity, and the fathers of the homeland provided the model, exalted the genius, and represented the kind of person who could advance the singularity of their entire people, and therefore of the home nation.

Vamba's citizenship educational project was an expression of a specific historic moment, characterised by the desire to decant the ideals of the Risorgimento into a "passion" for the homeland, inspired by feelings of freedom, cohesion and awareness.

The roots of Bertelli's political thought can be traced back to his unconditional faith in his mentor, Giuseppe Mazzini, and to certain points of contact with the latter's thinking. Even with due recognition of differences and specificities, Vamba's development of nationalistic ideas and values and his transmission of these through literary production had clearly begun from the patriotic catechism developed by the founder of the *Giovine Italia* movement.

In the thought of the leading exponent of the Italian Risorgimento, the ideas of unity and national identity constituted the main principles of the proposed broad intervention, both cultural and political. This would be implemented on several fronts, not only in the national context, but more broadly in a primordial European perspective, through strengthening the fruitful bonds of solidarity and cooperation between peoples. To Mazzini, «the condition of a divided and unfree Italy, of infighting between factions of the same state and the same city, of fierce personal conflicts and irremediable discord» was inconceivably unjust. Rather than acceptance of this status, his aspiration was for «concord and unity», which he considered material and ideal prerequisites not only for the creation of a common homeland, but also for the true civic and moral *redemption* of individuals.

The Genoese patriot promoted a far-sighted international approach, necessitating dialogue between nations and political factions, in particular between Republicans and Socialists. This overall political vision included Italy as an integral part of the broader European culture.

Mazzini also realised that his utopian idea of a republic could not be realised without a strong spirit of sacrifice and firm faith in the political ideals of freedom, duty and unity. His concept of a republic was that of an educative institution, capable of representing an entire nation and not a single faction, in

a collective perspective of social peace. In line with this, he aimed to involve the poorer social classes in political action, and above all, decided to wage a fierce journalistic battle in favour of the workers, with the aim of promoting freer forms of association, unlike the «materialism and collectivism» that was rampant at the time¹¹.

Vamba would continue the democratic tradition originated by Mazzini, assuming the role of spokesperson for the ideals of unity and freedom but taking a view that appears more elitist and particularistic. In his works, especially those dedicated to the children and youth of the Italian bourgeoisie, the promotion by the Genoese republican of the much-lauded spirit of collaboration and solidarity is now circumscribed by the national borders, with the addition of the irredentist lands, in respect of deep patriotic sentiment, but almost completely excluding any clear references to an international or global dimension.

In Luigi Bertelli, therefore, the principle of “brotherhood” and the project of unity, clearly present in the rereading of Mazzini’s works, is reduced from the European level and instead stressed still more in a strictly national dimension, and with regards to the painful matter of the territorial, linguistic and cultural unity of the peninsula.

Both, however, were convinced that the process of forming an Italian national consciousness and identity had to be incentivised, including through the promotion of a common language and history, just as, beginning with the rise of Fascism and its accentuated processes of political exploitation, they were

¹¹ Cf. B. Montale, *Rileggendo Mazzini*, in P. Boero, F. De Nicola, B. Montale, A. Ascenzi, O. Rossi Cassottana, E. Guagnini, V. Gueglia, F. Fasce, *Giuseppe Mazzini: verifiche e incontri. Atti del Convegno nazionale di Studi* (Genova, 26 gennaio 2006), Sestri Levante, Gammarrò, 2006, pp. 11-15. For in-depth information on the figure of Mazzini and his role in nineteenth-century politics, within the vast bibliography, we refer to: G. Mazzini, *Doveri dell'uomo: pensiero ed azione, Dio e popolo*, 4th ed., Rome, Tipografia alle Terme Diocleziane, 1875; L. Ambrosoli, *Giuseppe Mazzini e Carlo Cattaneo dal Risorgimento all'Unità*, Florence, L.S. Olschki, 1969; *Mazzini e il mazzinianesimo: atti del 46° Congresso di Storia del Risorgimento italiano* (Genova, 24-28 settembre 1972), Rome, Istituto per la Storia del Risorgimento Italiano, 1974; F. Della Peruta, *Mazzini e i rivoluzionari italiani: il partito d'azione (1830-1845)*, Milan, Feltrinelli, 1974; S. Mastellone, *La democrazia etica di Mazzini (1837-1847)*, Rome, Archivio Guido Izzi, 2000; L. Bellatalla, “*Dei doveri dell'uomo*” di Giuseppe Mazzini tra pedagogia e politica, in G. Genovesi (ed.), *Formazione nell'Italia unita: strumenti, propaganda e miti*, 5 vols., Milan, FrancoAngeli, 2002, Vol. 2, pp. 34-49; R. Sarti, *Giuseppe Mazzini: la politica come religione civile*, Rome-Bari, Laterza, 2005; G. Mazzini, *Pensieri sulla democrazia in Europa*, ed. by S. Mastellone, Milan, Feltrinelli, 2005; S. Mattarelli, *Dialogo sui doveri: il pensiero di Giuseppe Mazzini*, Venice, Marsilio, 2005; D.M. Bruni (ed.), *Potere e circolazione delle idee: stampa, accademie e censura nel Risorgimento italiano. Atti del Convegno di Studi nel bicentenario della nascita di Giuseppe Mazzini*, Milan, FrancoAngeli, 2007; O. Sagramola, *Giuseppe Mazzini nel Risorgimento italiano: pensiero/azione, educazione/politica*, Viterbo, Sette Città, 2007; S. Levis Sullam, *L'apostolo a brandelli: l'eredità di Mazzini tra Risorgimento e fascismo*, Rome-Bari, Laterza, 2010; G. Mazzini, *Scritti politici*, edd. by T. Grandi and A. Comba, Turin, UTET, 2011; D. Bruno, *Un Risorgimento del popolo: Mazzini fra Roma, cultura ed educazione popolare*, Canterano, Aracne, 2020.

retrospectively conjoined in a false and partial reconstruction of their thinking and production.

To convey his important cultural, social, and for the most part, civic-ethical messages, Bertelli chose iconography – in the form of the so-called *pupazzetti* – and, above all, literature, in different genres and for different audiences: from poetry to scientific popularisation, from humorous articles published in the polemical Roman magazines of the mid-1800s¹² to those appearing in «Il Giornalino della Domenica», the periodical for youth and children that he himself conceived and directed, and finally from primary-school reading books to volumes offering a passionate reading of civil history.

The works of “Bertelli as educator” assume a particularly significant character in the context of forming the civil consciences of the younger generations and educating them in citizenship, which the author identified as fertile grounds for the interventions that would complete the unfinished work of the Risorgimento. In line with the famous motto «Once Italy is made, the Italians must be made» and his strong support of the aims of national unity, while operating in a playful style that was never pedantic or excessively moralistic, *Vamba* elaborated a true civic-ethical project, serving to educate his young readers in patriotic sentiments, in the true concept of nationhood, and attempted to define, once and for all, the complete Italian identity.

In the course of the history and later analysis of Bertelli’s works, however, his elaboration and promotion of the idea of the nation was twice misinterpreted: first by the posthumous fascistisation of his thought, encouraged in part by some of his earlier and closer collaborators¹³, second through a discriminatory and generalising reading of nationalist principles in general, which in the latter half of the twentieth century became a *taboo* subject, as these were implicitly related with extreme European totalitarian conceptions, above all those of Hitler’s National Socialism and Mussolini’s Fascism.

In reality, a critical re-reading of *Vamba*’s works allows complete redemption of the author from such unfounded accusations, which, moreover, have long been the basis of the disregard for his numerous literary works dedicated to children. Among all of these, it is the *Giornalino di Gian Burrasca* published for the first time by Bemporad in a 1912 volume, that remains foremost in our memory, and stands out as a great classic of children’s literature¹⁴.

¹² Bertelli’s major collaborations included those with «Capitan Fracassa», a periodical directed by Luigi Arnaldo Vassallo, «Il Fanfulla» and «Don Chisciotte della Mancia». For a more in-depth look at polemical journalism in Rome, see G. Squarciapino, *Roma bizantina*, Turin, Einaudi, 1950; N. Tranfaglia, *La stampa italiana nell’età liberale*, Bari, Laterza, 1979; O. Majolo Molinari, *La stampa periodica romana dell’Ottocento*, Rome, Istituto di studi romani, 1963, Vol. II.

¹³ On this subject, see for example the analysis and negative interpretation proposed by Gibelli in A. Gibelli, *La grande guerra degli italiani*, Milan, Sansoni, 1998.

¹⁴ The volume consisted of a collection of Giannino Stoppani’s adventures, written by Bertelli and previously serialised (from February 1907 to May 1908) in «Il Giornalino della Domenica».

To begin the analysis and in-depth study of the complex range of actions of the Florentine writer in favour of the realisation of the project of civic-ethical education of the new generations, we must first observe some of his important contributions serving in this purpose, published around the end of the nineteenth and the beginning of the twentieth century. What we will see, in effect, is that Bertelli became a personal instrument operating in the necessary national development of deeply dialoguing links between citizens, for elaboration of a common narrative, serving in the recognition of themselves as Italians, at last overcoming particularisms, provincialisms and individual political representations, which had hindered development of a truly constructive climate and were instead fuelling sterile public debate.

After abandoning his militant commitment to political satire and beginning with his very first publication for children and youth, in whom Bertelli had deep faith, he immediately sought to provide precise indications on the formation of their civil conscience.

In 1895, *Vamba* published *Ciondolino*, a novel about a «careless and untidy boy» who envies the existence of ants, for their freedom from obligations and duties. Due to a series of circumstances, however, Ciondolino finds himself catapulted into a true journey through the animal world, replete with difficulties, and comes to understand the scope of this reality and to mature an awareness that each individual – animal or human – has «obligations towards the community to which they belong», constituting the true font of civil action, expressed through principles of responsibility and solidarity, without which the very meaning of individual existence would be lost¹⁵.

Following this first successful children's literary work, *Vamba* chose the periodical «Il Giornalino della Domenica», which he himself founded in June 1906, as the main propagandistic medium for his political-educational project¹⁶.

¹⁵ Cf. 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, p. 188.

¹⁶ On the publication of the *Giornalino*, see above all: L. Nissim Rossi (ed.), *Le grandi firme del «Giornalino della Domenica»*, Florence, Bemporad Marzocco, 1959; A. Ascenzi, *Lettere a Vamba. «Il Giornalino della Domenica» nei rapporti epistolari tra Luigi Bertelli e i suoi collaboratori*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 317-362; P. Pallottino (ed.), *L'irripetibile stagione de «Il Giornalino della Domenica»*, Bologna, Bononia University Press, 2008; S. Assirelli, *La rappresentazione dell'infanzia nelle copertine de «Il Giornalino della Domenica» (1906-1911). Un itinerario iconografico*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 145-177; R. Andreassi, *The Correspondence (Corrispondenza) of «Il Giornalino della Domenica» (1906-1911): a training ground for the development of civic education and national sentiment in Italian youths*, «History of Education & Children's Literature», vol. X, n. 2, 2015, pp. 405-423; A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, 2 vols., Milan, FrancoAngeli, 2018, Vol. 2, pp. 331-362; S. Barsotti, *Vamba e «La grandezza dei piccoli»: «Il giornalino della domenica» (1906-1911)*, Rome, Anicia, 2020; S. Montecchiani, *Cento anni dalla scomparsa di Vamba: contributo per un bilancio storiografico su «Il Giornalino della Domenica» e per l'individuazione*

The explicit proposition of this newspaper, addressed to the young bourgeois generations, was to interest, entertain and educate its public, and above all, to «light and keep alive in the hearts of young readers the flame of the eternal ideals of the Country and of Humanity», promoted through «the strength that comes from the sincere voice of those who communicate deeply felt sentiments» and not through vain rhetoric or pedantic catchphrases¹⁷.

Along its tormented path of publication¹⁸, Bertelli's periodical continuously never failed to pursue this concise conception of his training and civic-ethical education project. Pursuing a precisely calculated strategy, using simple language in a targeted but irreverent style, he influenced the development of social and political communications in the inheriting generations of *Giornalino* conception and tradition. *Vamba* was a sincere listener, and the rarity of his attention to children's tastes and interests made him a sort of ideal confidant for his readers, an adult who knew how to understand their needs and their points of view, becoming a «child among children».

The key to the success of Bertelli's works for children lies in these two factors of sincerity and trust in his relations with interlocutors. *Vamba* would not only develop deep ties with his readers, but also promote them between the entire editorial staff and their intended publics. Thanks to the teachings promoted in the pages of the *Giornalino*, the Florentine director was able to at least ideally complete that long process of national unification so longed for in the Risorgimento, but which had remained unfinished. The publication welcomed and «gathered» the voices of many young people, who in this literary environment felt they were truly an integral part of a collective body, with a true *Italian* identity¹⁹. In spite of the individual peculiarities and physical

di nuove prospettive di ricerca, «History of Education & Children's Literature», vol. XV, n. 2, pp. 825-842; A. Greco, *Sul progetto educativo di Vamba: l'infanzia "giornalinesca" e la genialità*, «l'Artista. Critica delle arti in Toscana», vol. II, 2020, pp. 12-35.

¹⁷ This explicit declaration of intent appeared in the initial programme and closing decalogue of the first issue of «Il Giornalino della Domenica», published on 24 June 1906.

¹⁸ The newspaper founded by Luigi Bertelli was first published by Bemporad in 1906, as an innovative and high-quality product among periodicals for children and youth. In 1911, however, to the dismay of the editor, the *Giornalino* was forced to close, due mainly to financial difficulties. At the close of the Great War, in 1918, the editorial staff moved to Rome and the newspaper resumed issue under the publisher Enrico Somigli. In 1920, the offices returned to Florence, but in the same year *Vamba* died, and with him the original publishing project disappeared. After a brief interruption, in 1921, the periodical resumed under the direction of Fanciulli, one of Bertelli's main collaborators, operating from offices in Milan and with publication by Alfieri and Lacroix in Rome. Between 1922 and 1926, however, with the rise of Fascism, the editors chose to enter into significant ideological and practical compromises, in an attempt to keep the *Giornalino* in operation. These important managerial and editorial changes led to disputes between Fanciulli and Bertelli's heirs, and despite a last, much suffered attempt to recover the earlier format and successes, the *Giornalino* ceased publication completely in 1927.

¹⁹ In this regard, as early as 1907 we read: «We all feel that with all our little friends, and not just in words, we form an immense family in which there is no distinction of degrees of kinship... And this result, undoubtedly happy, we believe is due more than anything else to the great frankness

separations within the national borders, Bertelli succeeded in bringing to life a true *Confederation* of children and young people, without distinction of gender, religion or social background. His readers shared a common language, common cultural and recreational interests, and willingly entered into the pursuit of knowledge, the spirit of cooperation and of mutual solidarity. All of these were principles dear to Bertelli, and before him to his political model, Giuseppe Mazzini²⁰.

Particularly during the first period of its publication, between 1906 and 1911, «Il Giornalino della Domenica» communicated nationalistic tones and constantly promoted Mazzini's ideas; strategies that took on greater scope and allegorical value in light of the political events and the events leading to the outbreak of the First World War. Under Bertelli's editorship, the *Giornalino* developed as an effective medium for the exaltation and celebration of the most relevant episodes of the Risorgimento, aimed at completing the process of national unification and gathering a veritable *Pantheon* of the fathers of the homeland.

An article by *Vamba* himself, issued in September of the first year of publication, is particularly significant in these regards. In memory of the Breach of Porta Pia, the author recalls his own emotions as a young witness to that momentous day: mixtures of wonder, curiosity, sorrow and joy, and above all eager and «anxious anticipation». On September 20th, Luigi's uncle Guglielmo had brought the 10-year-old boy to Piazza della Signoria in Florence, to wait together for the much hoped-for announcement of the liberation of Rome, and where

the crowd grows constantly. The Florentine people arrive along all the streets leading to the square, anxious, moved, palpitating, their eyes fixed on the tower of their own Palazzo Civico, their lips parting in a sweet and venerated name, uttered with a kiss as pure as a mother's: Rome!

Suddenly the flag appears on the mast, the great bell rings...

with which we have attracted readers, trying to arouse in their souls, without rhetoric and without boredom, those senses of balanced Italianness, of healthy and modern morality and of civil culture, which alone can truly unite the great and the small in a common ideal and in common practice» (*Ieri, oggi, domani*, «Il Giornalino della Domenica», a. II, n. 30, 30 July 1907, p. 11).

²⁰ In 1908, the newspaper proclaimed the founding of the *Confederazione giornalinesca*, a sort of Balocco State parallel to the real political-institutional one, through which *Vamba* aimed to prepare his young compatriots for democratic life and to promote various forms of youth associationism. The birth of the *Confederation* was narrated in «Il Giornalino della Domenica», a. III, n. 26, 28 June 1908, pp. I-V, in an article signed by *Il Cronacaio*. On the *Confederazione giornalinesca*, see also C. Papa, *La Confederazione giornalinesca di Vamba (1908-1911): una monarchia repubblicana per diritto morale*, «Annali dell'Istituto Gramsci Emilia-Romagna», n. 4-5, 2000-2001, pp. 169-183; and L. Calvitti, *Per conservare e tramandare la memoria di una grande esperienza formativa alimentata da un'autentica passione civile. La costituzione del fondo archivistico e libraio Luigi e Serena Calvitti dedicato a Vamba*, a «Il Giornalino della Domenica» e all'esperienza della «Confederazione Giornalinesca», «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 409-414.

But the cry of the people, mad with enthusiasm, covers even the chimes...
 What a moment that was! Everyone hugging each other, everyone crying...
 And the tricolour flag waving bravely on the Tower of Palazzo Vecchio, pronouncing to all: – So at this very same moment I wave over Free Rome!

The same article associates the author's memories of that momentous day with others, of the celebrations in Rome, on the Janiculum Hill, for the twenty-fifth anniversary of «her silver wedding anniversary with Italy», in 1895. In particular, he recalls the grandeur of the monuments erected in the city in memory of «the sources of history, of the great and small imprints of the protagonists of the grand drama», and mainly, the monument to Garibaldi, or rather to the one «who represents Mazzini's word, transformed as a flaming sword»²¹.

In July 1907, in celebration of the one hundredth anniversary of Garibaldi's birth, Bertelli devoted an entire issue of «Il Giornalino della Domenica» to this «hero of the two worlds» and to his historic military exploits²². Through the figure of the great *condottiero*, *Vamba* aimed to promote fundamental values in the moral and civic education of youth: love of life, the spirit of resilience, dignity, respect for one's own convictions and authority in all its forms, honour, action and boldness.

²¹ *Vamba*, XX *Settembre*, «Il Giornalino della Domenica», a. I, n. 13, 16 September 1906, pp. 1-4. Bertelli also mentions two sonnets composed by Edmondo De Amicis, another great supporter of the national unification process. Another particularly significant article by *Vamba*, published a few weeks later in issue 18 of the *Giornalino*, and entitled *Villa Gloria*, memorialises the place of Garibaldi's daring feat of October 1867, paralleling it with Thermopylae, but unfortunately with the same «tragic epilogue». This same text recalls the heroic gestures of the Cairoli brothers, and the erection of commemorative monuments in their honour (*Vamba*, *Villa Gloria*, «Il Giornalino della Domenica», a. I, n. 18, 21 October 1906, pp. 1-3).

²² «Il Giornalino della Domenica», a. II, n. 27, 7 July 1907. The front page of this issue presents a colour portrait of the Italian patriot, by Galileo Chini. Inside are the articles: *Volete voi essere garibaldini?* [Do you want to be Garibaldini?] by *Vamba*; *Un bacio di Garibaldi* [A kiss from Garibaldi], recounting two biographical episodes taking place at Sant'Alberto in 1849 and 1859; «*Vera gloria*» [True glory]; *Come un bambino vide Garibaldi* [How a child saw Garibaldi] by Scarpelli, recounting the meeting between his older brother and the patriot, and including his own colour illustration celebrating the monument dedicated to Garibaldi on the Janiculum Hill; *Il pilota dei "Mille"* [The pilot of the "Thousand"] by Leopoldo Barboni, dedicated to Antonino Strazzerà, the «ignorant» fisherman who led the Thousand to the port of Marsala; a facsimile of *Garibaldi's Letter to Anita* (1849); *Visioni garibaldine* [Visions of Garibaldi], concerning the many visual depictions of the *condottiero*; a lithographic version of *Il "Garibaldi"*, by Plinio Nomellini; *Le interruzioni di Mario* [Mario's interruptions], a sort of storytelling dialogue, explaining the patriot to children; *I piccoli martiri della Repubblica Romana* [The little Martyrs of the Roman Republic], focusing on the sacrifice of children and the pain of women during the war; *L'orrore di Garibaldi* [Garibaldi's horror], by Lino Ferriani; *Le Pistole d'Omero* in this case exalting the general's seriousness and honesty; *Alessio Ulivieri*, dedicated to the composer of the Anthem to Garibaldi; *Caprera di Garibaldi* by Jack La Bolina, and finally *Le madri dei caduti e dei martiri* [The Mothers of the Fallen and Martyrs].

Garibaldi, the epitome of the patriotic hero, could serve as an inspirational model to the young generations of the new century, but for this to occur, they first needed to understand the reasoning underlying his great renown. For this purpose, the *Giornalino* narrated his deeds and the characteristics of his “personage”, so that young readers could themselves comprehend the values of his “person”. As Nicola Misasi defined him in one of the articles, this «knight of humanity» was consecrated as the true architect of Italian liberation, the one who made material the creation of a free and independent homeland.

Through the celebration of Garibaldi, *Vamba* also reiterated the importance of sincerity, elevated to a fundamental characteristic for the education of new citizens, repudiating any form of lying, and recalling the author’s deep indignation towards the artificial and deceptive attitudes assumed by a large part of the political class of the time.

Other prominent figures of the Italian Risorgimento recalled in the pages of the *Giornalino* included Aurelio Saffi, depicted as a politician of value and heir to Mazzini’s republican demands. A 1907 article by Lino Ferriani applied hagiographic language in elevating Saffi to the status of national hero, a sort of lay saint who, through an «heroic individual sacrifice» comparable to Mazzini’s, educated the citizens on their fatherland, enabling them «to fulfil the duties of the common destiny»²³. These efforts at enhancing the intergenerational bonds with the new youth extended to the persons of Giuseppe Verdi, for whom Eugenio Checchi researched a complete biography²⁴, and above all, to Count Camillo Benso of Cavour, described in a 1910 article by *Vamba* himself, as «a man of exceptional nature», who in spite of the traditional anti-revolutionary prejudices of the Piedmontese aristocracy, succeeded, through great ambition, «in being what he aimed to be» and in driving the Austrians out of Italy²⁵.

A common feature of the narrations of the Risorgimento profiles in the pages of Bertelli’s periodical is that they always recalled the individual’s childhood and youth, their family of origin, and in particular, the determined ways in which they had made their own life exceptional. The fathers of the homeland represented indispensable models for the development of social responsibility and the formation of the civic sense of the *Giornalino* public, and their virtues and ideals were those in which every child should be educated. As *Vamba* wrote, «if you feel you are someone [...] then have the ambition to become something», that is, take your own part in advancing the national cause.

Bertelli’s patriotic spirit also led to his vital interest in another central issue of the continuing process of Italian unification, that of its irredentist goals. The

²³ L. Ferriani, *Ricordi giovanili*, «Il Giornalino della Domenica», a. II, n. 42, 20 October 1907, pp. 1-2.

²⁴ E. Checchi, *Giuseppe Verdi*, «Il Giornalino della Domenica», a. I, n. 16, 7 October 1906, pp. 1-5.

²⁵ *Vamba*, *Il conte Camillo Benso di Cavour*, «Il Giornalino della Domenica», a. V, n. 33, 14 August 1910, pp. 1-3.

problem of the north-east boundaries of the country had not been resolved at the close of the third war of independence, and indeed had emerged at the centre of the early twentieth-century political debate. Given this context, *Vamba* could not fail but engage in these matters in his own political reflection and educational project. In line with the accusations of non-fulfilment of Italian diplomatic action with the Austrians, the Florentine journalist felt a strong resentment for the oppression suffered by his compatriots, on the other side of the borders officially established after 1866. The subject of the eastern border, in reality, involved particular complexities, not only of a political nature, but also concerning the profound cultural, ethnic and linguistic differences of the populations of the territories of Istria, Dalmatia and Trieste.

Bertelli chose «Il Giornalino della Domenica» as the vehicle for dealing with this issue, in the civic education of his young public and in support of the cause of the «mutilated victory». First and foremost, his approach was to promote a deep spirit of solidarity and brotherhood, transcending national borders. The vision of patriotism expressed in *Vamba*'s editorial work was above all an expression of love for freedom, and of acting on the feeling of Italian citizenship, within a truly national, communitarian and united dimension. From the outset of its publication, in fact, the *Giornalino* had always welcomed contributors, subscribers and readers from beyond the national borders, and devoted great space, in particular, to the Italian compatriots' resident in the irredentist lands.

The *Stato balocco*, founded by *Vamba*, united all children who felt truly Italian, regardless of their geographical location, through their shared language and self-recognition as participants in the core cultural tradition. Moreover, through the *Corrispondenza* section, regularly included in the *pink pages*, the editor encouraged his readers to assume the spirit of aggregation and collaboration, and truly participate in the work of youth mobilisation by providing their own contributions on critical national issues. Through the epistolary relationships established in the pages of the *Corrispondenza*, the individuals of the *Giornalino* generations came to get to know each other, mutually *recognise* one another, deepen the bonds of friendship, and in the process express their aspirations, interests, and above all their personal identities.

In this regard, the conspicuous and active presence of Triestine contributors, subscribers and readers is emblematic. Bearing the names and pen-names, largely female, of children and youth from Trieste we find contributions from Scipio Slataper, Stuparich, Enrico Elia; the young subscribers Irma Greco, Maria Skeff, sisters Tina and Benvenuta Levi, Elda Camerini, Adriana Margheritti, Marcella Dorligo, Gilda Skoff, Lidia...Istrian, Laura Kund, Maria Zanardini, Lidia Segrè, Fior Tricolore, Rita Scholz, Renata Caligaris, as well the boys Bruno Segher, Guido Zanetti, Alberto Riccoboni, Guido Salvi, and many others.

Inevitably, *Vamba*'s irredentist activism carried over into a strong interest in the "Fiume matter", particularly as concerns the 1919-1920 enterprise led by his friend Gabriele D'Annunzio. Bertelli visited the city over the months

of October-November 1919, accompanied by one of his closest collaborators, Giuseppe Fanciulli, and promoted the initiatives in the pages of the *Giornalino* through a series of articles elaborating the themes of patriotism and of liberation of Italian compatriots from oppression²⁶.

The occupation of Fiume took on symbolic value in the collective imagination of Italian patriots. Even though the question of the eastern borders would continue unresolved, Bertelli's weekly served as a valid medium for informing the home population, and above all for communication between the Italian and irredentist territories, thereby contributing significantly to the consolidation of a national identity – one not necessarily corresponding to the territorial identity.

3. *The civic-ethical education project promoted by the school and the education for citizenship elaborated by Luigi Bertelli*

Following the proclamation of the Reign of Italy, one of the emergent questions in the political and educational debate concerned the means of constructing a national civic-ethical identity, for transformation of the unified state as a true nation, necessarily involving the re-emergence of a substratum of common traditions and the development of a collective memory that would be *truly* Italian.

The main targets of the project for education and formation of national sentiment obviously had to be the new generations, who represented the future of the nation itself, and these therefore became the object of a progressive work of propaganda and education in civic conscience. The *nationalisation* of childhood was tackled in a transversal manner both through official channels, meaning the schools, and through the contributions of the intellectual-patriots who animated the political and cultural debate of the early 20th century.

²⁶ Some of the most notable communications in this regard are the series of letters of *Il Generale Ceccherini da Fiume*, and the autograph letter from Gabriele D'Annunzio to *Vamba*, both published in the pink pages of «Il Giornalino della Domenica», a. VII, n. 44, 19 October 1919, pp. I-II; and the articles by G. Fanciulli, *Ieri e oggi (Tornando da Trieste)*, «Il Giornalino della Domenica», a. VII, n. 48, 16 November 1919, pp. 1-2; F. Giunta, *L'incantesimo*, «Il Giornalino della Domenica», a. VII, n. 52, 14 December 1919, pp. 3-4; G. Fanciulli, *Vamba a Fiume*, «Il Giornalino della Domenica», a. IX, n. 21, 27 November 1921, pp. 7-9. On the participation of Bertelli and *Il Giornalino* in the Fiume issue see also: K. Pizzi, *Building a Nation: The National Question In Vamba's Giornalino della Domenica, First Series (1906-1911)*, «Children's Literature Association Quarterly», vol. 28, n. 4, 2003-2004, pp. 203-209; C. Gallo, *Vamba e i ragazzi del «Giornalino della Domenica» a Fiume*, in *Atti Accademia Roveretana degli Agiati*, a. 258, ser. VIII, vol. VIII, A, f. I, 2008, available at the link <http://www.museocivico.rovereto.tn.it/UploadDocs/5153_art10_gallo.pdf> (last access: 10.03.2021); G. Montino, *Le tre Italie di Giuseppe Fanciulli: educazione e letteratura infantile nel primo Novecento*, Turin, SEI, 2009, pp. 43-46; S. Fava, *Italian Readers of Il Giornalino della Domenica and Il Passerotto between the Great War and the Fiume Endeavour*, «Libri & Liberi», vol. 7, n. 2, 2018, pp. 203-222.

These actors proposed a project that would counterbalance the transformism of the political class and the unfulfilled aspirations of the Risorgimento. They looked at the dissemination of patriotic values as necessary for the formation of the individual conscience and for the transmission of reference models to the younger generations, for self-identification and acquisition of the principles of freedom, ambition, cooperation and unity that would serve as foundations for the process of national unification, in both civic and territorial sense.

Particularly significant in this regard, in terms of the works for children and youth developed by Luigi Bertelli in the early twentieth century, were the contributions from «Il Giornalino della Domenica» and the initiatives in the name of the *Confederazione giornalinesca del Girotondo*. Although the newspaper and the *Confederation* were *Vamba*'s favoured instruments for the promotion of youth aggregation and mobilisation²⁷, the Tuscan writer added others, embodying the same patriotic sentiment and political reflections, which can be considered equally important.

In 1915, precisely in the aftermath of the forced closure of the *Giornalino*, Bertelli published the book *I bimbi d'Italia si chiaman Balilla. I ragazzi italiani nel Risorgimento nazionale*, in which he reconstructed, with passionate style and skill, the heroic deeds of the children and youth of the Risorgimento, driven by patriotism and the spirit of sacrifice for the national cause. This text contributed to the propaganda against the political parties then opposing Italian entry into the war, although the preparation had predated the context. For some time, in fact, the Florentine author had collected photographs, documents and accounts of the history of children during the Risorgimento, and this publication was really intended as a preview or first chapter of a much larger project – one that would remain unfinished due to Bertelli's death²⁸.

In the 1936 posthumous edition of *I bimbi d'Italia si chiaman Balilla* – issued at the height of the Fascist era – the editor, Aldo Valori, inserted a prefacing note. Valori had been one of Bertelli's closest collaborators in the *Giornalino* editorial staff. In addition to contextualising this new edition in the «national» climate generated by the regime, he offered his nostalgic memories of *Vamba*, whom he considered his teacher in the field of journalism, and identified as «the first who not only dared to speak frankly to young people about 'politics', but who constantly directed their emotions and passions towards a national and

²⁷ In particular, one thinks of the numerous *Leghe* and *Feste del Grillo* organised by the *Confederazione giornalinesca*: important occasions of meeting and exchange for the large public of children and youths involved in the *Giornalino* experience. On the *Festa del Grillo*, see especially the issue of the *Giornalino* dedicated to the theme, entitled *La Festa del Grillo in tutta Italia* («Il Giornalino della Domenica», a. VI, n. 23, 4 June 1911).

²⁸ For a more complete analysis of the text, see especially: Fanciulli, Monaci Guidotti, *La letteratura per l'infanzia*, cit., pp. 279-280; Michieli, *Vamba*, cit., pp. 158-161; Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, cit., pp. 214-216.

warlike goal, which at that time meant 'irredentism'²⁹. During the first phase of the Giornalino experience, in fact, Italy was living in what was substantially a period of peace, during which the idealised liberation of the irredentist lands assumed a symbolic value with respect to oppressed compatriots, and therefore to the entire nation.

Bertelli, in the preface to the first edition, had dedicated the volume to the Florentine students Giacomo and Augusto Morpurgo, identified as «soldiers of Italy in the most beautiful hour of its history». In September 1914, the brothers had sent a letter, drafted in collaboration with other students, proposing a home-country organisation capable of replacing the civil servants called up for military service, and asking *Vamba* to prepare a «conference to launch and illustrate» this project. The noble intentions of these students, «against all the selfishness of the miserable bourgeois and proletarian bureaucracy», had stimulated the author to add to the information previously gathered on the period of the Risorgimento and apply himself to finishing a book «that would recall the soul, the deeds and images of his boys, of those who in the first Giornalino he had, with a prophetic spirit, prepared for the last war of liberation, and with a father's and friend's heart now followed them as they fought, and mourned them when they died»³⁰. Bertelli was the son of that «middle generation», born «too late and too early to do anything». This personal history had left him with the profound desire to preserve and honour the memory of the fathers «who fought», and of the sons who would now have to fight, «delivering to the Future, full of hope, always lit, the sacred torch of the Ideal that the Past, full of glory, entrusted into our hands»³¹. This fervent sentiment led to his decision to write *I bimbi d'Italia si chiaman Balilla*³², employing the same clear and direct style that had characterised the civic education project of the Giornalino, which represented the model manner of narrating (homeland) history to children, so that they would not only remember it, but above all identify with that history, making it an instrument of ethical, civil and moral education and training³³.

Vamba had developed his educational project after the proclamation of the Reign of Italy, and in parallel with that offered by the official channels, meaning the state school system. With the enactment of the Coppino law of 1877, raising the age for compulsory education to nine years old, and for the first-time instituting sanctions against defaulting parents, the official system emerged as a privileged means of training children in the renewed national context³⁴.

²⁹ Vamba (L. Bertelli), «*I bimbi d'Italia si chiaman Balilla*». *I ragazzi italiani nel Risorgimento nazionale*, ed. by A. Valori, Florence, R. Bemporad & Figlio, 1936, pp. XVII-XVIII.

³⁰ The quotation is from Omero Redi's preface in *ibid.*, p. VI.

³¹ Vamba, *XX Settembre*, «Il Giornalino della Domenica», a. I, n. 13, 16 September 1906, p. 1.

³² The same patriotic ideals and motivations led Bertelli to also prepare the civic history texts *Un secolo di storia italiana (1815-1918)* and *O patria mia*, both published posthumously.

³³ Cf. Michieli, *Vamba*, cit., p. 161.

³⁴ For an analysis of the evolution of schools and school legislation in modern and contemporary Italy, in the vast bibliography on the subject, see in particular: D. Bertoni Jovine, F. Malatesta,

In this way, as the share of children attending primary school increased, so did the pool of those who received at least a rudimentary civic and national education³⁵.

In line with this educational and cultural perspective, education became a means of forming the consciences of future citizens and promoting the principles of nationality, and the teaching of history became the main instrument in the work of transmitting not only knowledge on the processes of building the unitary state, but even more so in the ethical and civic implications of political realisation for the Italian nation³⁶.

Although some of the ruling class disapproved of the extended access to education³⁷, the strengthening of primary literacy and civic instruction gave new impetus to the process of *nationalisation* for the country, bearing in particular on the spirit of self-sacrifice, on the duties of citizenship, and on respect for the authorities³⁸.

Complementary to the fundamental role of formal education in history, in narrating the glorious splendour of the past and the transmission of patriotic models, the teaching of another subject known as *Diritti e doveri del cittadino*³⁹ also played a primary part. The latter material had already been introduced into the Italian school system under the governments of the liberal class, especially with the Casati law of 1859, but without its inclusion among compulsory subjects. By the early twentieth century the subject was taught not only in primary schools, but also in some lower secondary programmes – in

Breve storia della scuola italiana, Rome, Editori Riuniti, 1961; G. Ricuperati, *La scuola nell'Italia unita*, in R. Romano, C. Vivanti (edd.), *Storia d'Italia*, 5.2: *I documenti*, Turin, Einaudi, 1973, pp. 1695-1738; E. Catarsi, *Storia dei programmi della scuola elementare, 1860-1985*, Scandicci, La Nuova Italia, 1990; L. Pazzaglia, R. Sani, *Scuola e società nell'Italia unita: dalla legge Casati al centro-sinistra*, Brescia, La Scuola, 2001; N. D'Amico, *Storia e storie della scuola italiana: dalle origini ai giorni nostri*, Bologna, Zanichelli, 2010; R. Sani, *Sub specie educationis: studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011; L. Bellatalla, G. Genovesi, E. Marescotti, *La scuola nell'Italia unita: 150 anni di storia*, Padua, CLEUP, 2012; H.A. Cavallera, *Storia della scuola italiana*, Florence, Le lettere, 2013.

³⁵ Cf. G. Gabrielli, *Educated alla guerra. Nazionalizzazione e militarizzazione dell'infanzia nella prima metà del Novecento*, Verona, Ombre Corte, 2016, pp. 11-12.

³⁶ On this subject, see above all A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, Milan, Vita & Pensiero, 2004.

³⁷ This critical situation is neatly represented in the famous phrase of the Minister of Education Guido Baccelli, pronounced in 1894: «Istruire il popolo quanto basta, educarlo più che si può» [«Educate the people as much as you need to, educate them as much as you can»]. The comment refers to the necessity of increasing the level of primary literacy, with a view to greater balance and social control, in the context of deep-rooted conservative reluctance and political opposition.

³⁸ Cf. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, cit., pp. 96-97.

³⁹ For a broader reconstruction of the evolution of this educational subject in the first forty years after the unification of Italy, see in particular the fundamental text by A. Ascenzi, R. Sani, *Tra disciplinamento sociale ed educazione alla cittadinanza. L'insegnamento dei Diritti e Doveri nelle scuole dell'Italia unita (1861-1900)*, Macerata, eum, 2016.

particular in technical schools and normal and magistral schools –, for purposes of providing the younger generations with a secular and civil catechism that would promote the feeling and duties of citizenship.

The teaching of *Diritti e doveri del cittadino* courses was interpreted differently depending on the objectives of the overall educational programme, with the aim of forming the pupils' civic awareness and preparing them for the daily exercise of citizenship. The subject underwent numerous "technical" and content-related variations throughout the course of the twentieth century, but it offers a rare example of response to the very real gap between *ideal* and *real* citizenship. This dissatisfaction with this gap, moreover, was at the root of the deep disappointment and impatience of the country's ruling class, as well as being felt among the ranks of intellectuals loyal to the myth of the Risorgimento – feelings that were shared by Bertelli himself.

The analysis of the «scholastic culture»⁴⁰, and in particular of the contents of the subjects of History and Rights and Duties of the Citizen, starting from the post-unification period, brings to light not only the methodological and content changes of these disciplines, but also allows observation of how their ideological and political bent influenced the promotion of a national and political identity shared by all Italian citizens.

In this sense, therefore, it can be said that in the forty years following the proclamation of the Kingdom of Italy, both schools and the "extracurricular" culture pursued similar objectives in the field of education and the civic-ethical formation of the new generations. Although varying in their tools and genres, both drew on the stories of the great events of the past and the exploits of patriotic heroes – above all narrative-biographical and hagiographical ones – to stimulate the emotional dimension of children and young people, and to provide them with models of moral and civic behaviour with which they could identify.

Conclusions

In recent years, in light of the importance assumed by the main conceptual nodes in the evolution of civic education and the problem of national cohesion in the political and social debate, historical-educational research has attempted a critical reading of the development of the concepts of *national identity* and *citizenship*, which over time and depending on the historical period of reference, have taken on different characteristics, sometimes increasingly merging and

⁴⁰ Cf. D. Julia, *Riflessioni sulla recente storiografia dell'educazione in Europa: per una storia comparata delle culture scolastiche*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 3, 1996, pp. 119-148.

sometimes separating⁴¹. The two notions, in fact, cannot be considered entirely equivalent, as is demonstrated by an analysis of the ways in which the country dealt with the formation of the civil consciences of the younger generations of Italians through the late nineteenth and early twentieth centuries, and the extension of these issues in contemporary times.

In line with this tendency, therefore, the critical rereading of the concept of nation elaborated by *Vamba*, and the development of his educational project, handed down through the Giornalino generations, albeit partially, allows us to *re-contextualise* the process of *nationalisation* undergone by Italian children and specifically by middle-class youth, during the first half of the twentieth century. The analysis of Bertelli's experience, one of the most significant in the sphere of literature for children at the beginning of the last century⁴², allows us to observe how the involvement of young people in the collective activities and the public life of the country played an important part in hastening the processes of national modernisation and social maturation, throughout the peninsula.

The growing interest in the new generations was also synergistic with the renewed sensibility among political and educational actors, who for the first time comprehended and set about developing the potential of children and youth, particularly in the perspective of civic commitment. The patriotic, ideological and military propaganda to which young people were subjected in the period between the two world wars, both at school and at home, shows how their mobilisation and associationism, above all of a lay nature, became a means of promoting *national* culture and the enhancement of typically Italian virtues.

⁴¹ On the recent contributions in historical-educational research, without any pretension of exhaustiveness, see: Chiosso, *L'educazione nazionale da Giolitti al primo dopoguerra*, cit.; Id., *Nazionalità ed educazione degli Italiani nel secondo Ottocento*, «Pedagogia e Vita», n. 4, 1987, pp. 421-440; S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, 2 vols., Bologna, Il Mulino, 1993; L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999; N. Tranfaglia, *L'Italia repubblicana e l'eredità del fascismo*, Alessandria, Edizioni dell'Orso, 2001; M. Viroli, *Per amore della patria. Patriotismo e nazionalismo nella storia*, Rome-Bari, Laterza, 2001; Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, cit.; B. Bongiovanni, N. Tranfaglia (edd.), *Le classi dirigenti nella storia d'Italia*, Rome-Bari, Laterza, 2006; Gabrielli, *Educati alla guerra. Nazionalizzazione e militarizzazione dell'infanzia nella prima metà del Novecento*, cit.; 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*, Milan, FrancoAngeli, 2017; R. Sani, *Education, school and cultural processes in contemporary Italy*, Macerata, eum, 2018; F. Targhetta, *Un paese da scoprire, una terra da amare: paesaggi educativi e formazione dell'identità nazionale nella prima metà del Novecento*, Milan, FrancoAngeli, 2020.

⁴² For an in-depth study of the publishing market dedicated to children over the later nineteenth and earlier twentieth centuries, see Boero, De Luca, *La letteratura per l'infanzia*, cit.; and L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, Milan, FrancoAngeli, 2004.

José Saramago infantil e juvenil*

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José Saramago for Children and Youth

ABSTRACT: The relationship between José Saramago's writing (Golegã, Portugal, 1922 – Lanzarote, Spain, 2010; Nobel Prize for Literature 1998) and young readers began in 2001, with the publication of his book *A Maior Flor do Mundo*, illustrated by João Caetano. This was the first and the only text that the Portuguese writer explicitly addressed to children (but not only to them), but it is not Saramago's only work that, in the format of an illustrated album, we can associate with the universe of literature for childhood, as I hope to show in this article.

EET/TEE KEYWORDS: José Saramago; Portuguese children's literature; Tale; Metafiction; Illustration; Portugal; Spain; XXth Century.

A Maior Flor do Mundo: um clássico da literatura infantil

Em bom rigor, não é em 2001 que *A Maior Flor do Mundo*¹ surge pela primeira vez. Noto este facto para ser fiel à história da produção e da receção desta narrativa, que parecia estar destinada ao esquecimento e ao fracasso, não, como acontece desde 2001, a um sucesso raro entre os livros escritos para os mais novos. Rogério Puga salientou já a explicação que Saramago nos dá numa entrada do seu *blog*, em 2009, à qual chamou «História de uma Flor»²:

Aí pelos começos dos anos 70, quando eu ainda não passava de um escritor principiante, um editor de Lisboa teve a insólita ideia de me pedir que escrevesse um conto para crianças.

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¹ A partir de agosto de 2015, este livro passa a ser editado pela Porto Editora, agora com ilustrações de André Letria, que, como João Caetano, que ilustrou a edição de 2011, é um dos mais reconhecidos ilustradores portugueses.

² R.M. Puga, *A temática da viagem ecológica em 'A Maior Flor do Mundo', de José Saramago, e na curta-metragem 'A Flor Mais Grande do Mundo', de Juan Pablo Etcheverry*, «Revista de Letras», vol. 50, n. 2, jul.-dez. 2010.

Não estava eu nada certo de poder desobrigar-me dignamente da encomenda, por isso, além da história de uma flor que estava a morrer à míngua de uma gota de água, fui-me curando em saúde pondo o narrador a desculpar-se por não saber escrever histórias para a gente miúda, a quem, por outro lado, diplomaticamente, convidava a reescrever com as suas próprias palavras a história que eu lhes contava. O filho pequeno de uma amiga minha, a quem tive o desplante de oferecer o livrinho, confirmou sem piedade a minha suspeita: «Realmente», disse à mãe, «ele não sabe escrever histórias para crianças». Aguardei o golpe e tentei não pensar mais naquela frustrada tentativa de vir a reunir-me com os irmãos Grimm no paraíso dos contos infantis. Passou o tempo, escrevi outros livros que tiveram melhor sorte, e um dia recebo uma chamada telefónica do meu editor Zeferino Coelho a comunicar-me que estava a pensar em reeditar o meu conto para crianças. Disse-lhe que devia haver um engano, porque eu nunca tinha escrito nada para crianças. Quer dizer, havia esquecido totalmente o infausto acontecimento. Mas, há que dizê-lo, foi assim que começou a segunda vida de «A maior flor do mundo», agora com a bênção das extraordinárias colagens que João Caetano fez para a nova edição e que contribuíram de maneira definitiva para o seu êxito. Milhares de novas histórias (milhares, sim, não exagero) foram escritas nas escolas primárias de Portugal, Espanha e meio mundo, milhares de versões em que milhares de crianças demonstraram a sua capacidade criadora, não só como pequenos narradores, também como incipientes ilustradores. Afinal, o filho da minha amiga não tivera razão, o conto, de transparente simplicidade, havia encontrado os seus leitores.

A Maior Flor do Mundo é uma das obras de Saramago menos abordadas tanto pelos estudos literários como por outros campos do saber e da cultura que dela se poderiam ocupar com muito proveito. Ainda assim, há alguns artigos incontornáveis para a compreensão de um livro que, se não figura entre os mais estudados da bibliografia saramaguiana, é certamente um dos mais lidos³. Esta situação – um texto relativamente pouco estudado, mas muito lido e conhecido – tem a ver com o próprio estatuto genológico de *A Maior Flor do Mundo*, que se inscreve na chamada literatura infantil. Apesar da evolução registada nos últimos anos, esta área ainda é considerada um campo menor da Literatura e, conseqüentemente, da crítica literária e das áreas do conhecimento que com ela dialogam. Esta vicissitude em nada prejudica o texto de Saramago, que é um clássico incontestado.

Dois dos três estudos de referência que conheço sobre *A Maior Flor do Mundo* exploram os elementos metaficcionais e autorreflexivos⁴ e a «arquitetura textual»⁵ da narrativa de Saramago. Esta questão é, de facto, central, uma vez que a *A Maior Flor do Mundo* abre com um metatexto que é uma declaração de

³ R. Miguel Puga, *José Saramago's 'A Maior Flor do Mundo': Metafiction for children?*, «Portuguese Studies Review», vol. 12, n. 1, 2004, pp. 189-194. A. Margarida Ramos, *Leituras em torno de A Maior Flor do Mundo de José Saramago: aspectos da arquitectura textual*, in *Livros de Palmo e Meio. Reflexões sobre Literatura para a Infância*, Lisboa, Editorial Caminho, 2007, pp. 189-202; Puga, *A temática da viagem ecológica em 'A Maior Flor do Mundo', de José Saramago, e na curta-metragem 'A Flor Máis Grande do Mundo', de Juan Pablo Etcheverry*, cit., pp. 471-483.

⁴ Puga, *José Saramago's 'A Maior Flor do Mundo': Metafiction for children?*, cit.

⁵ Ramos, *Leituras em torno de 'A Maior Flor do Mundo' de José Saramago: aspectos da arquitectura textual*, cit., p. 189.

princípio do narrador sobre as coordenadas essenciais da escrita para a infância: «As histórias para crianças devem ser escritas com palavras muito simples, porque as crianças, sendo pequenas, sabem poucas palavras e não gostam de usá-las complicadas»⁶. Mas o narrador não se limita a notar a especificidade dos textos produzidos para os mais novos; apresenta-se também como *autor* real. São conhecidas estas palavras de Saramago, publicadas um ano antes de lhe ter sido atribuído o Prémio Nobel da Literatura: «a figura do narrador não existe»⁷; «só o autor exerce função narrativa real na obra de ficção, qualquer que ela seja, romance, conto ou teatro»⁸.

José Saramago, autor e adulto, é quem declaradamente pensa e escreve a história, quem comunica as suas vivências e a sua visão do mundo. O seu projeto, contudo, confessa ele ao leitor, falhou. Por isso, num ato de humildade e sinceridade, o escritor diz ao leitor que apenas lhe pode dar uma história de pouco valor: «Quem me dera saber escrever essas histórias, mas nunca fui capaz de aprender, e tenho pena. Além de ser preciso saber escolher as palavras, faz falta um certo jeito de contar, uma maneira muito certa e muito explicada, uma paciência muito grande – e a mim falta-me pelo menos a paciência, do que peço desculpa»⁹. Estas palavras, esta *captatio benevolentia*, não são uma mera estratégia retórica. Visam aproximar do leitor um narrador-autor humilde e muito consciente da dificuldade e complexidade inerentes à escrita de obras para os mais jovens. São palavras que pretendem também preparar os leitores (ou ouvintes) para a ideia, formulada no final, de que eles próprios podem vir a escrever histórias.

José Saramago não quer esconder nem ampliar o seu nome e a sua imagem. Interessa-lhe apenas contar uma história que ele, a princípio, acreditava que «seria a mais linda de todas as que se escreveram desde o tempo dos contos de fadas e princesas encantadas». Isto é já uma instrução de leitura que remete para o desejo que aproxima todos os escritores e narradores orais de ontem e de hoje: à criação e à escrita de um texto, de um livro, subjaz sempre, em algum momento, o anseio de criar o melhor dos livros, o melhor dos textos (poema, conto, romance, etc.), e de com isso contribuir para a construção de um mundo mais justo. O leitor, infantil ou adulto, cria expectativas em relação à poética alegadamente pobre de um criador que, um pouco mais à frente, marca mais uma vez a distância entre o valor da experiência vivida pelo menino e a história que a narra: «Dali para diante, para o nosso menino, será só uma pergunta sem literatura: ‘Vou ou não vou?’ E foi». No fundo, a atitude de Saramago não é diferente da de um dos muitos narradores orais que podemos ainda encontrar em meios rurais e urbanos, em Portugal e não só. Refiro-me, especialmente,

⁶ J. Saramago, *A Maior Flor do Mundo*, ilustração de João Caetano, Lisboa, Editorial Caminho, 2001. Sem numeração de páginas.

⁷ Id., *O autor como narrador*, «Ler», n. 38, 1997, p. 38.

⁸ *Ibid.*

⁹ Saramago, *A Maior Flor do Mundo*, cit.

aos contadores de histórias não profissionais, muitos deles não (ou pouco) alfabetizados, os quais dizem, muitas vezes, que a história que vão ou estão a contar não é exatamente assim, mas que é nesses termos que eles a recordam no momento e são capazes de a reproduzir. A minha já longa experiência de recolha no concelho de Baião (concelho mais recuado e interior do distrito do Porto) prova-me que é assim. Esses narradores, tal como Saramago em *A Maior Flor do Mundo*, têm a nostalgia de uma história mais perfeita e sedutora para os ouvintes e/ou leitores.

Há conteúdos e técnicas capitais nesta narrativa. Tudo o que o menino faz é da ordem do natural e do inefável: deambular «pelos campos, entre extensos olivais, ladeando misteriosas sebes cobertas de campainhas brancas, e outras vezes metendo por bosques de altos freixos onde havia clareiras macias sem rasto de gente ou bicho, e ao redor um silêncio que zumbia, e também um calor vegetal, um cheiro de caule sangrado de fresco como uma veia branca e verde». Esta metáfora e esta comparação provam que o menino não distingue o humano do animal e vegetal. Para ele, que se entrega ao mundo e o recria, não há senão o natural simultaneamente do real e do imaginário.

Tudo, para o menino e para o leitor, é estranhamento e estremecimento, descoberta e prazer: «Ó que feliz ia o menino!». Temos aqui uma representação breve mas muito exata da ação e da imaginação infantis. Para a criança, o maior está no mínimo, no que é aparentemente menor ou insignificante, concretizado, na narrativa de Saramago, na flor, na história que o menino «achou que tinha de salvar» (o leitor infantil competente estabelecerá um paralelismo com a rosa d'O *Príncipezinho*). O mínimo pede o olhar e o gesto desmedidos que só a autenticidade da imaginação infantil podem concretizar. A aventura e as vitórias do menino inscrevem-se na linguagem do mito: o elemento água é vida, a saga em demanda de umas escassas gotas é a conquista do impossível: «Mas que é da água? Ali, no alto, nem pinga. Cá por baixo, só no rio, e esse que longe estava! [...] Não importa». A sua viagem significa a dissolução e a metamorfose de todas as leis físicas e biológicas. O menino e o mundo são um ser indivisível. Tanto para as crianças e para aos adultos que leem o livro como para os adultos-personagens que intervêm na narrativa praticamente apenas como figurantes, as palavras e os gestos do protagonista são uma atividade poética, um fazer com valor individual mas também coletivo e universal, porque a viagem desta criança é *ecológica*:

Desce o menino a montanha,
Atravessa o mundo todo,
Chega ao grande rio Nilo,
No côncavo das mãos recolhe
Quanto de água lá cabia,
Volta o mundo a atravessar,
Pela vertente se arrasta,
Três gotas que lá chegaram,

Bebeu-as a flor sedenta.
Vinte vezes cá e lá,
Cem mil viagens à Lua,
O sangue nos pés descalços,
Mas a flor aprumada
Já dava cheiro no ar,
E como se fosse um carvalho
Deitava sombra no chão¹⁰.

Esta história constrói-se sobre um projeto ambicioso e revela-se uma obra-prima na forma e no conteúdo, apesar de o autor não ver qualquer grandeza no seu texto. Ele diz-nos apenas que quis «contar, com pormenores, uma linda história que um dia inventei, mas que, assim como a vão ler, é apenas o resumo de uma história, que em duas palavras se diz...»¹¹. Rogério Puga, no estudo em que aproxima *A Maior Flor do Mundo* e a curta-metragem *A Flor Máis Grande do Mundo*, de Juan Pablo Etchverry, afirma que esta narrativa de Saramago «metaforiza [...] o altruísmo, o respeito do ser humano pelo equilíbrio ecológico, bem como vários tipos de viagem: a aventura geográfica e interior do protagonista e a viagem da leitura»¹². Aludi já quer à viagem geográfica e interior, quer também à viagem da leitura, implicada nos apelos que Saramago faz aos seus jovens leitores. A viagem ecológica não só se relaciona com estas várias viagens como lhes é consubstancial. Esta narrativa é surpreendente pela brevidade formal e profundidade dos conteúdos, pela articulação entre o discurso mais comum e mais poético, pelo modo como se conta uma história e se ouve a voz do autor-narrador, e essa relação entre a economia formal e a riqueza e a diversidade das ideias e das sugestões é particularmente notável nesta passagem: «Sobre ele, resguardando-o do fresco da tarde, estava uma grande pétala perfumada, com todas as cores do arco-íris».

Podemos ler aquela passagem, que é uma síntese exemplar da dialética natureza protetora e ser humano protetor e cuidador, como uma ecotopia que sucede à distopia com que nos deparamos no encontro do menino com a flor «tão caída, tão murcha». Um leitor jovem verá neste momento uma flor, um ser vivo, que necessita de ajuda, e isso é suficiente para desencadear uma empatia com o texto. Já um leitor adulto poderá ver aqui um mundo natural cuja desagregação acentua a tendência do ser humano para o desequilíbrio. Se este livro for partilhado entre uma criança e um adulto, ou entre várias crianças e vários adultos, esta leitura poderá ser explorada. Lembremos, aliás, que o autor-narrador escreve, entre parêntesis, no início da história propriamente

¹⁰ *Ibid.*

¹¹ *Ibid.*

¹² Puga, A temática da viagem ecológica em 'A Maior Flor do Mundo', de José Saramago, e na curta-metragem 'A Flor Máis Grande do Mundo', de Juan Pablo Etcheverry, cit., p. 437.

dita, «Agora vão começar a aparecer algumas palavras difíceis, mas, quem não souber, deve ir ver no dicionário ou perguntar ao professor»¹³.

A breve ecotopia que esta narrativa de Saramago nos oferece é um sinal de esperança numa relação mais harmoniosa entre o ser humano e a natureza. Muito lida e trabalhada em escolas um pouco por todo o mundo ocidental (e não só), *A Maior Flor do Mundo* é já «part of a larger ecological literacy»¹⁴. A expressão «ecological literacy» «refers to a conscious awareness and understanding of the relationships among people, other organisms, and the environments in which they live»¹⁵, e está sobretudo associada ao livro de David Orr *Ecological Literacy: Education and the Transition to a Postmodern World* (1992). Neste trabalho, o autor defende muito claramente que «all education is environmental education»¹⁶, mas também que «most education now presents environment and nature as resources for people, as products for consumers, as things we as humans act upon rather than within»¹⁷. Daí ser muito importante desenvolver, tão cedo quanto possível, a partir de bons textos literários como este de Saramago, a literacia ecológica das crianças.

O contributo da crítica literária, em especial da ecocrítica (estudo das interseções entre a literatura, a cultura e a sociedade e a Natureza e o Ambiente), pode ser decisivo para o equacionamento em larga escala dos desafios ecológicos e éticos. Os problemas ambientais e os problemas humanos que se lhe associam não são apenas problemas científicos. São também uma questão sociocultural, moral e ética, a que a literatura tem vindo a dar uma dimensão cada vez mais forte social e culturalmente. A literatura implícita ou explicitamente ecocêntrica desenvolveu sempre a nossa literacia ecológica e filosófica. Hoje, através da ecocrítica, o impacto ecológico e cultural deste diálogo pode e deve ser ainda maior.

A ecocrítica pode contribuir para o desenvolvimento da consciência ecológica de diversos tipos de especialistas e assim conduzir à sensibilização de toda a sociedade. Neste processo, como é óbvio, há parceiros privilegiados: educadores de infância e professores, não só os de língua portuguesa e de literatura mas também os de outras disciplinas, as crianças, os jovens e os estudantes em geral. Não podemos esquecer que a literatura é pensamento e movimento. Por isso, como a física, a ética, a filosofia ou a metafísica, constitui uma força de modelização do ser humano e do mundo. Como ser na natureza, o ser humano move-se dentro e fora de si. Conciliando a cultura científica com

¹³ Saramago, *A Maior Flor do Mundo*, cit.

¹⁴ 'It's not easy being green'. Jim Henson, *the Muppets, and ecological literacy*, in S.I. Dobrin, K.B. Kidd (edd.), *Wild Things. Children's Culture and Ecocriticism*, Detroit, Michigan, Wayne State UP, 2004, p. 234.

¹⁵ *Ibid.*, p. 233.

¹⁶ D. Orr, *Ecological Literacy: Education and the Transition to a Postmodern World*, Albany, State U of New York P, 1992, p. 90.

¹⁷ *Ibid.*, p. 233.

a cultura humanística, a escola pode combater a cultura do desperdício e da destruição do ambiente e de todas as formas de vida (incluindo a humana). Os educadores e professores de todos os graus de ensino são agentes que podem atuar de modo muito positivo nas interações sociais e ambientais.

Regressemos à narrativa de Saramago. Contada a história, o autor-narrador insiste na sua inabilidade enquanto escritor de contos para a infância: «Este era o conto que eu queria contar. Tenho pena de não saber escrever histórias para crianças. Mas ao menos ficaram sabendo como a história seria, e poderão contá-la doutra maneira, com palavras mais simples do que as minhas, e talvez mais tarde venham a saber escrever histórias para as crianças»¹⁸. No primeiro parágrafo do texto, na segunda frase, há já a assunção da inabilidade do autor-narrador, reforçada, exatamente a começar, por uma frase que é uma teoria sobre a escrita para a infância: «As histórias para crianças devem ser escritas com palavras muito simples, porque as crianças, sendo pequenas, sabem poucas palavras e não gostam de usá-las complicadas. Quem me dera saber escrever essas histórias, mas nunca fui capaz de aprender, e tenho pena»¹⁹. A narrativa assume-se simplesmente como um gesto de cumplicidade e um convite (o leitor é convidado a ser um escritor): «Quem sabe se um dia virei a ler outra vez esta história, escrita por ti que me lês, mas muito mais bonita?».

José Saramago trata o seu destinatário sem paternalismos, ao contrário do que, lendo o primeiro parágrafo, poderá pensar um adulto menos familiarizado com a escrita e o pensamento de José Saramago. O autor dá a ler um texto rico em simbolização e transfiguração, mas também reflete metaliterariamente com o leitor acerca dos mistérios da imaginação e da escrita: «Em certa altura, chegou ao limite das terras até onde se aventurara sozinho. Dali para diante começava o planeta Marte, efeito literário de que ele não tem responsabilidade, mas com que a liberdade do autor acha poder hoje aconchegar a frase». O começo propriamente dito da narrativa, que se segue à informação de que «Na história que eu quis escrever, mas não escrevi, havia uma aldeia», coloca a página como espaço material de criação de palavras e universos, de personagens e sonhos.

O texto de José Saramago é, afinal, exigente e inseparável do compromisso do autor com o pensamento, a escrita e a ação na sociedade portuguesa e no mundo. Há uma diferença entre exigência e ilegibilidade. José Saramago fala explicitamente sobre *infância* aos seus destinatários infantis. Diz-lhes (e diz-nos) que é desse tempo que vem a essência de cada ser humano; e mostra-lhes que de uma página em branco pode nascer um mundo que, criado pelo autor e pelo ato de escrita, existe já em cada criança: «Logo na primeira página, sai o menino pelos fundos do quintal, e, de árvore em árvore, como um pintassilgo,

¹⁸ Saramago, *A Maior Flor do Mundo*, cit.

¹⁹ *Ibid.*

desce ao rio e depois por ele abaixo, naquela vagarosa brincadeira que o tempo alto, largo e profundo da infância a todos nós permitiu».

Mas esta não é apenas a história de uma criança que, salvando uma flor, salva o mundo (leitura metafórica). É a história de todas as crianças que não se veem privadas da sua infância. Ler este texto pode significar, para o jovem leitor, aprender a viver uma “alegre inconsciência” e a ter *consciência disso* (como diz Fernando Pessoa no poema «Ela canta, pobre ceifeira»). Viver a infância é, para o menino, salvar o mundo e ser salvo por ele. A família e os vizinhos partem em «busca do menino» e, quando o encontram, levam-no para casa, «rodeado de todo o respeito, como obra de milagre».

As ilustrações desta obra, na primeira edição da Caminho ilustrada por João Caetano, também levantam uma questão pertinente e complexa tanto para os leitores em geral como para a crítica e a teoria literárias: a da relação, a que já aludi, entre o autor empírico e o sujeito que enuncia o texto. A criança, para me referir apenas ao destinatário direto desta obra, quer um corpo humano adulto que legitime o corpo verbal: o contador e/ou o autor. N’A *Maior Flor do Mundo*, a encarnação do escritor começa no olhar alegre do menino da história. Colocado no canto superior esquerdo da primeira página, ele, criança livre, espreita para o interior do livro e, perante as palavras e a imagem do escritor sentado à secretária, sorri.

As semelhanças entre a imagem do escritor e José Saramago são evidentes, e serão por certo comentadas pelos adultos que folheiem o livro com uma criança. O autor, em três planos sucessivamente ampliados, sentado a uma mesa apenas com uma caneta e um copo de água, reflete sobre a sua história e sobre os modos de a dizer. O primeiro quadro é pequeno, difuso e misterioso, e o seu conteúdo é perceptível porque os dois quadros seguintes constituem uma aproximação ritmada (o escritor, no terceiro plano, já tem uma caneta na mão mas não escreve; e continua a apoiar a cabeça, agora com a esquerda). Há uma ligação entre este quadro e o da última página, que também é diminuto e enigmático. Este quadro é, aliás, mais ambíguo, apesar de ser também esclarecido por um plano um pouco maior em que é possível distinguir sobretudo a flor no alto da «inóspita colina redonda como uma tigela voltada»²⁰, segundo a descrição inicial. Os dois outros elementos são talvez o escritor na sua secretária e uma casa.

Há, portanto, uma celebração do escritor, que está bem presente em todo o livro: na iconografia e na deixis pronominal e verbal de primeira pessoa do singular. Da relação entre as imagens, as considerações do narrador-escritor e a sua história advêm noções como a procura de domínio técnico e disciplinado da subjetividade e da construção narrativa ou a demanda de uma história de sentido exemplar. Estas questões têm uma origem: o autor, que dedica a sua

²⁰ *Ibid.*

vida a um ofício que, árduo e solitário, é ao mesmo tempo recompensador e feliz.

As imagens harmonizam-se com os sentidos do texto. Construídas num traço que tem tanto de representação figurativa como impressionista, evocam o visto, o vivido e o imaginado à maneira *infantil*. São várias as técnicas que intervêm nesta figuração da realidade-do-maravilhoso: românticas (a preferência pelo cromatismo avermelhado e acastanhado ou a mitificação das figuras populares e do maravilhoso como a fada que se encontra na cortina e os pequenos seres humanos que saem de livros ou olham o escritor a partir de uma estante), modernistas ou surrealistas (a colagem, a interseção de planos espaciais e de elementos mais ou menos insólitos ou tornados estranhos pelo contexto) e naïfs (os desenhos de flores e da nave espacial com o menino dentro ou a impressão de textura rugosa quer do fundo de página quer de alguns planos-chave como o do rosto do menino sobre o mundo). A expressão pictural de João Caetano sugere sensações tácteis ou associações sinestésicas, tal é a consistência e a combinação das cores, a, digamos, rugosidade e visualidade da matéria significativa cromática. Trata-se de uma ilustração com *textura* que é capaz de representar a vida interior das personagens e das coisas, o calor ou o frio dos sentimentos ou dos espaços, a estrutura mais profunda do real e do imaginário.

A primeira imagem a duas páginas, que, como o texto, nasce literalmente da mão e da caneta do escritor, é uma síntese dessas matrizes. Acrescem, na amplidão deste primeiro grande plano, os ritmos do menino a correr e do pássaro a voar, que imprimem à ilustração mobilidade e versatilidade fílmica. Nas duas páginas seguintes, o menino desliza sobre uma ponte, colocada bem acima de vastas extensões de terra que parecem ser países, incluindo uma parte de Portugal com algumas cidades deslocadas da sua posição original.

As mãos do escritor, a caneta, a folha em branco e o copo de água são, não por acaso, os pormenores que mais se repetem. Simbolizam o trabalho do escritor. Os três primeiros formam exclusivamente a imagem que ilustra o prelúdio desta história e, por extensão, de qualquer história.

Este polimorfismo principia na capa, no seu verso e na primeira página, e estende-se até à contracapa, ao seu interior e à penúltima página. Mas a verdade é que toda a ilustração propõe leituras metafóricas e simbólicas que convergem em ideias transversais a toda a obra de José Saramago: ética, dignidade, liberdade, humanismo. Por exemplo: a régua que acompanha o caule da flor; o pássaro pousado ao lado de Portugal, mais propriamente acima do «Dist. de Santarém», aqui situado no Sul; o coelho, que, debaixo da ponte, olha a medo para o menino; ou as mãos do menino, que, abertas, deitam uma gota de água sobre a Terra (a imagem é reproduzida três vezes, de modo a abarcar todos os continentes e a transmitir a ideia de que a ação do menino é universal).

Sem as mãos, a caneta e a folha de papel não há a nomeação e a revitalização do comum e do inominável, não há escrita. No final, o escritor, com uma mão sobre o copo da água, olha sorridente para a flor. Esse sorriso, acompanhado

pelas palavras que dirige aos seus destinatários, é outro sinal de cumplicidade (que convoca e prolonga o contacto inicial). O livro, corpo animizado pelos signos linguísticos e pictóricos que transporta, confirma-se como palavra e imagem, voz e olhar. A realidade que existe para lá do texto não é apagada, mas o texto também não se reduz a uma direta e previsível transposição da realidade.

Há uma «moral da história»²¹, como declara o narrador-escritor. Uma moral que constitui uma realidade completa, não um complemento da realidade, e, assim, é possível dizer que a realidade exterior ao texto passará a incorporar a marca desta história: «Quando depois passava pelas ruas, as pessoas diziam que ele saíra da aldeia para ir fazer uma coisa que era muito maior do que o seu tamanho e do que todos os tamanhos»²².

O Conto da Ilha Desconhecida: *conto juvenil*?

Vejamos agora *O Conto da Ilha Desconhecida*, publicado pela primeira vez em 1997 (desenhos de Pedro Cabrita Reis, Lisboa: Pavilhão de Portugal Expo'98 / Assírio & Alvim). Esta narrativa não foi escrita especialmente para o público infantil e juvenil. Contudo, a inclusão do livro na lista de obras recomendadas para os alunos do 8.º ano de escolaridade, que se justifica plenamente, explica que se tenda a vê-lo enquanto obra especificamente dirigida aos leitores infantis e juvenis. Para essa ideia hoje muito divulgada contribuem, antes de mais, dois fatores: o título da obra, que lembra os livros de aventuras tão ao gosto do público mais jovem (o termo «conto» associado ao sintagma «Ilha Desconhecida»); e, desde 2015, a informação «Leitura recomendada. 8.º ano», patente na capa em forma de uma espécie de selo, na edição da Porto Editora, ilustrada por Fatinha Ramos.

Apesar de ser relativamente breve, este texto, cujo título inclui o termo («conto») que lhe define o género literário a que pertence, é uma síntese perfeita de toda a obra ficcional de Saramago. O autor publicou *O Conto da Ilha Desconhecida* um ano antes de lhe ser atribuído o Prémio Nobel da Literatura, e por isso não surpreende que nesta obra o autor use o estilo fluente, solto e rico de associações que o singularizou; um estilo oralizante, como com frequência é definido, à falta de uma qualificação que o descreva e qualifique com mais propriedade. À força da realização estilística, que, como é sabido, caracteriza toda a escrita de Saramago, junta-se a abrangência de uma visão que atravessa os grandes temas e motivos da vida humana: do amor e dos grandes anseios humanos às questões do poder e da estratificação social.

²¹ *Ibid.*

²² *Ibid.*

O *Conto da Ilha Desconhecida* começa com uma frase simples e lapidar, e a fala que se lhe segue não é menos corrente e concisa: «Um homem foi bater à porta do rei e disse-lhe, Dá-me um barco»²³. Uma outra característica da escrita de Saramago, a de suscitar pensamento, vigilância e vontade de ação no leitor, torna-se mais evidente imediatamente a seguir, na frase «A casa do rei tinha muitas mais portas, mas aquela era a das petições»²⁴, e sobretudo nas três dezenas de linhas posteriores, nas quais há uma representação social e política que assenta num grave e comedido humor satírico e irónico cujo alvo é o rei e o seu comportamento burocrático, interesseiro e imoral:

Como o rei passava todo o tempo sentado à porta dos obséquios (entenda-se, os obséquios que lhe faziam a ele), de cada vez que ouvia alguém a chamar à porta das petições fingia-se desentendido, e só quando o ressoar contínuo da aldraba de bronze se tornava, mais do que notório, escandaloso, tirando o sossego à vizinhança [...], é que dava ordem ao primeiro-secretário para ir saber o que queria o impetrante, que não havia maneira de se calar²⁵.

O protagonista deste conto é o ser humano de qualquer tempo e de qualquer lugar que não se deixa abater pelos obstáculos, por mais insuperáveis que possam parecer, e persiste dia após dia. Este homem não desistiu enquanto não lhe foi permitido ser recebido pelo rei, que se limitava a dar uma ordem simples, a desencadear uma burocracia absurda e desumanizante e a manter, portanto, um estado de coisas kafkiano: «Então, o primeiro-secretário chamava o segundo-secretário, este chamava o terceiro, que mandava o primeiro-ajudante, que por sua vez mandava o segundo, e assim por aí fora até chegar à mulher da limpeza, a qual, não tendo ninguém em quem mandar, entreabria a porta das petições e perguntava pela frincha, Que é que tu queres»²⁶. Em certa medida, *O Conto da Ilha Desconhecida* é a história de José Saramago, que, em 1997, a um ano de ser distinguido com o Prémio Nobel da Literatura, procurava (e haveria de continuar a procurar) a sua ilha desconhecida, esse lugar sempre inatingível cuja determinação, se orientada por razões justas e elevadas, move todos aqueles que anseiam por uma realização humana e espiritual acima da mera acumulação egoísta de riquezas materiais.

Esta é uma narrativa que seduz não só pelo enredo original e realista, pelo encadeamento rápido das sequências, mas também pelas considerações pragmáticas e filosóficas às quais nenhum leitor fica indiferente, porque são inerentes à condição humana, tanto no que ela tem de instintivo como adquirido pela civilização (pulsões, emoções e sentimentos como a amizade, o amor, a sexualidade, a sociabilidade, a curiosidade); uma narrativa, na qual a sátira, a ironia e o humor convivem com momentos de grande objetividade e de lirismo,

²³ J. Saramago, *O Conto da Ilha Desconhecida*, ilustração de F. Ramos, Porto, Porto Editora, 2015, p. 5.

²⁴ *Ibid.*

²⁵ *Ibid.*

²⁶ *Ibid.*, pp. 5-6.

que representa realidades sensíveis e concretas atravessadas pela complexidade da vida e das aspirações humanas mais elevadas (a realização individual na descoberta do desconhecido e na relação com o outro através do amor): «É estranho que tu, sendo homem do mar, me digas isso, que já não há ilhas desconhecidas, homem da terra sou eu, e não ignoro que todas as ilhas, mesmo as conhecidas, são desconhecidas enquanto não desembarcamos nelas»²⁷. *O Conto da Ilha Desconhecida* põe o leitor, e o jovem leitor em particular, perante a beleza e a verdade verbal, espiritual e física (o livro, as ilustrações) de um texto que é uma obra-prima do género contístico em língua portuguesa.

El Silencio del Agua (*memórias de infância*)

Em janeiro de 2011, sete meses após a morte de José Saramago, sai, com ilustrações de Manuel Estrada, *El Silencio del Agua*, que retoma um fragmento do livro *As Pequenas Memórias* (2006. A publicação em língua espanhola é de 2007), como se lê na ficha técnica. Narrado na primeira pessoa, com o autor-narrador a recordar um episódio marcante da sua vida juventude, este texto tem algumas afinidades com o célebre romance *Moby Dick* (1851), de Herman Melville. O «monstro»²⁸ da narrativa de Saramago não tem a dimensão do animal (um cachalote, o maior dos cetáceos) do livro de Melville, nem o final é trágico e disfórico como o da obra do escritor americano. Mas, ressalvadas as diferenças, a curiosidade que o peixe de Saramago *El Silencio del Agua* desperta no protagonista pode ser equiparada à obsessão que Ismael demonstra pela misteriosa criatura que o iria destruir. O jovem Saramago tudo fez para capturar o barbo que lhe escapou num primeiro momento e que ele voltou a tentar apanhar, mas sem sucesso. Há, contudo, uma espécie de vitória final, bem explicitada pela última frase do livro: «De alguna manera, com mi anzuelo enganchado en las agallas, tenía mi marca, era mío».

De qualquer modo, o momento mais forte do livro coincide com a sensação que antecede a experiência do fracasso em que se salda a tentativa de pescar aquela «bestia corpulenta», ou o que ele via como tal, «por la fuerza que demostró [...]. No creo que exista en el mundo un silencio más profundo que el silencio del agua. Lo sentí en aquella hora y nunca lo he olvidado»²⁹. É o encontro do sujeito consigo mesmo e com a natureza visível e invisível, com os seus medos e os seus anseios, as suas frustrações e as suas esperanças; é uma forma metafísica de sentir que do Saramago rapaz desta história evoluiu, no

²⁷ *Ibid.*, p. 35.

²⁸ J. Saramago, *El Silencio del Agua*, ilustração de M. Estrada, Barcelona, Madrid, Libros del Zorro Rojo, 2011. Sem numeração de páginas.

²⁹ *Ibid.*

Saramago homem, para uma forma metafísica de pensar, cuja «argumentação [...] será, por essência, *racional*»³⁰.

O Lagarto (*da crónica à literatura para a infância e a juventude*)

Em setembro de 2016, quinze anos depois da publicação de *A Maior Flor do Mundo* e seis após o falecimento do autor, é publicado um novo álbum ilustrado que mais uma vez o público poderá ser imediatamente induzido a associar à literatura infantil e/ou juvenil: *O Lagarto*, com ilustrações (xilografuras) de J. Borges, um artista (xilógrafo) e cordelista brasileiro.

No álbum *O Lagarto* não há qualquer referência à origem do texto, que foi publicado pela primeira vez como crónica num jornal e como tal republicado no livro *A Bagagem do Viajante*, que tem como subtítulo precisamente o termo *Crónicas* (Lisboa, Editorial Caminho, 1973). Mas é como conto, ou, mais livremente, como história, que o leitor, jovem ou adulto, lerá *O Lagarto*, em cuja contracapa, em grandes caracteres vermelhos, encontramos esta advertência: «De hoje não passa. Ando há muito tempo para contar uma história de fadas, mas isto de fadas foi chão que deu uvas, já ninguém acredita, e por mais que venha jurar e trejurar, o mais certo é rirem-se de mim. Afinal de contas, será a minha simples palavra contra a troça de um milhão de habitantes. Pois vá o barco à água, que o remo logo se arranjará». Este é o primeiro parágrafo de um texto que, publicado num jornal enquanto crónica e republicado também enquanto tal num livro de crónicas, terá certamente levado muitos dos primeiros leitores a questionar o estatuto genológico de uma narrativa que parece ser muito mais um conto (ou uma «história de fadas», como o narrador afirma logo na primeira frase) do que uma crónica. Terá sido a configuração de conto que determinou, antes de mais, a escolha deste texto para inclusão num álbum ilustrado, mas a sua vertente cronística de representação de um espaço e um tempo presentes (Lisboa, o Chiado) não terá estado ausente dos critérios do responsável por este livro. Na ficha técnica, aparece o nome de Alejandro García Schnetzer como detentor dos direitos «da obra original», e é assim porque foi sua a ideia de combinar a crónica de José Saramago à arte pictórica do brasileiro J. Borges.

O leitor que não conheça «O Lagarto» enquanto crónica não saberá que o parágrafo que na edição de 2016 surge na contracapa é o primeiro da versão original; e não saberá que esse primeiro texto tem agora n' *O Lagarto* enquanto álbum ilustrado uma organização por parágrafos com algumas diferenças, sem que isso altere o conteúdo. O primeiro parágrafo do livro é a primeira frase do segundo parágrafo da crónica: «A história é de fadas» (sem numeração de

³⁰ A. Marques, *O Essencial sobre Metafísica*, Lisboa, Imprensa Nacional – Casa da Moeda, 1987, p. 8.

páginas). Este *incipit*, sobretudo para o público mais jovem, é exemplar, e nem o facto de aqui ecoar a frase ou as frases próximas que introduzem o ato de contar um conto (como «Vou contar-te uma história de fadas», entre muitas outras combinações possíveis) diminui essa exemplaridade. Há, pelo contrário, um ganho de expressividade e de aura, uma vez que, em Saramago, a clareza da ideia e a simplicidade da expressão não são incompatíveis com profundidade e seriedade. Saramago foi um mestre nesta ligação entre o mais oralizante e o mais concetual; um mestre no ato de escrever como quem conta uma história, a diz na presença de uma pessoa ou de um auditório.

José Saramago, em 1998, escrevia «que, para entender quem eu sou, há que ir às crónicas. As crónicas dizem tudo (e provavelmente mais do que a obra que veio depois) aquilo que eu sou como pessoa, como sensibilidade, como perceção das coisas, como entendimento do mundo: tudo isso está nas crónicas»³¹. O escritor, com o respeito que sempre se lhe reconheceu por quem estudou e deu a conhecer a sua obra, ressaltava a possibilidade de os estudiosos da literatura terem «outra opinião, perfeitamente legítima e se calhar muito mais fundada»³².

Concordo inteiramente com Saramago e recorro a «O Lagarto» para demonstrar que a crónica ocupa um lugar especial na economia da obra literária de José Saramago. A frase «A história é de fadas», simples mas sonante, constitui uma espécie de síntese da escrita de Saramago, e a crónica «O Lagarto» é, neste raciocínio, um texto minimal que tem em si as principais características éticas e estéticas que celebrizaram este autor: a narrativa literária como representação e descoberta do mundo, da passagem do tempo e das transformações da História; a subversão de ideias feitas, pessoas, instituições e acontecimentos históricos tornados intocáveis pelos discursos oficiais; a escrita fluida e transparente, sem «aqueles ritmos e aquela espécie de ramificação constante»³³ e sem aquela «espécie de barroquismo»³⁴ que marcaram os primeiros romances do autor; o recurso à fusão do apontamento mais realista com elementos do maravilhoso e do fantástico; a assunção de que o escritor e o homem que lhe corresponde são uma e a mesma pessoa, e que, portanto, a responsabilidade ética da escrita deve prolongar-se na responsabilidade do escritor enquanto cidadão.

A tudo isto acresce, nas crónicas de Saramago, o «prenúncio da descoberta do mágico poder inventivo de símbolos, alegorias e estranhas personagens que abundantemente têm povoado a ficção deste escritor»³⁵. A personagem de *O Lagarto* é uma estranha personagem e um símbolo, sem dúvida, e a história funciona como uma alegoria com muitas possibilidades de leitura. Perante esta narrativa e as ilustrações (xilografuras) de J. Borges, os leitores adultos,

³¹ Apud C. Reis, *Diálogos com José Saramago*, Porto, Porto Editora, 2015 (1.ª ed., 1998), p. 46.

³² *Ibid.*, p. 46.

³³ *Ibid.*, p. 45.

³⁴ *Ibid.*, p. 46.

³⁵ *Ibid.*, p. 32.

dependendo da sua formação e do seu conhecimento sobre a obra e o pensamento de Saramago, captarão conscientemente o princípio que atravessa toda a escrita deste autor, para quem escrever foi sempre ação na vida da *pólis*, participação no fazer da vida pública e, em particular, política. Os leitores mais jovens farão interpretações diversas, mas não lhes escapará (muito pelo contrário, aliás, decerto) a matriz desta história, que nos fala de desconfiança, autoridade e poder (as forças de segurança interna e as Forças Armadas investem sobre o lagarto, que, de repente, se transforma numa grande rosa vermelha e depois num pomba branca), e também de transformação ética e estética do mundo. O *Lagarto* é claramente um *discurso* (discurso na aceção de Hannah Arendt) que se manifesta na esfera pública por meio da sabedoria reflexiva, da razão, do pensamento. Neste lagarto, personagem do fantástico que vem a ser, no final, uma pomba branca, há pensamento político e ação política, há, como no conto maravilhoso ou de fadas anónimo, um profundo sentimento de justiça e ética, há esperança no futuro do ser humano e do mundo (apesar do pessimismo confesso de Saramago), mas há, antes de mais, literatura. O *Lagarto* é um exemplo perfeito da *práxis* e da *poésis* artística e intelectual de José Saramago, que neste texto nos diz que uma *pólis* para todos, humanos e não humanos, pode nascer em qualquer lugar, em qualquer momento.

As ilustrações de *O Lagarto* remetem para uma tradição cultural e literária brasileira dita popular: a literatura de cordel e as xilogravuras das capas dos chamados folhetos (ressalve-se desde já: no cordel típico só as capas são ilustradas. Digo *típico* porque há cada vez mais um tipo de «folheto» ou livro, denominado «cordel ilustrado», que inclui ilustrações no interior, a preto e branco ou, mais recentemente, a cores, quando no cordel clássico as xilogravuras da capa são quase sempre a traço negro). Há uma certa coincidência temática e de motivos e um diálogo implícito com obras clássicas da literatura de cordel como *O Pavão Misterioso*, e isso explicará, parece-me, a escolha de J. Borges como autor das ilustrações deste livro. J. Borges, um mestre incontestado da xilogravura, tem ilustrado inúmeras capas de folhetos de cordel, mas também livros destinados ao grande público, como, entre outros, para além de *O Lagarto*, a edição brasileira completa, muito cuidada graficamente, dos contos dos Grimm³⁶.

O papel das ilustrações, nos livros dirigidos, antes de mais, aos públicos infantil e juvenil, não se resume à clarificação da mensagem. A ilustração não é uma paráfrase que visa concretizar um texto, torná-lo simplesmente legível ou compreensível. Em *A Ilustração do Livro Infantil* (1995), Luís Camargo classifica as funções da ilustração em termos que revelam bem a sua complexidade: funções descritiva, narrativa, estética ou lúdica, ética e simbólica, as quais se atualizam diferentemente de leitor para leitor e de faixa etária para

³⁶ J. Grimm, W. Grimm, *Contos Completos (1812-1815)*, ilustrações de J. Borges, tradução de C. Röhrig, São Paulo, Cosac Naify, 2012.

faixa etária³⁷. A imagem da capa, só por si, atrai o olhar do potencial leitor (ou comprador), convida-o a folhear o livro e, ao mesmo tempo, conduz à identificação imediata do tema ou da personagem central do texto (ou, n'O *Lagarto*, personagens, porque na capa do livro temos um lagarto, identificável com os monstros em que era fértil a literatura de cordel portuguesa, e, um pouco por cima dele, uma pomba. O lagarto desta «história de fadas», como o leitor saberá e como notei acima, transforma-se, no final, numa rosa vermelha e, a seguir, numa pomba).

Estamos no universo do álbum ilustrado, mas podemos procurar compreender a estratégia de construção da capa d'O *Lagarto* como se estivéssemos a analisar a capa de um folheto de cordel. A xilogravura da capa anuncia um relato de ações centrado num estranho monstro e num animal mais reconhecível (uma pomba) que voa sobre ele. Pretende atingir-se um resultado que, no fundo, não difere do resultado que os tipógrafos e os editores-impressores da literatura de cordel portuguesa e europeia visavam, e que é também o resultado que perseguem ainda hoje os responsáveis pelos muitos folhetos de cordel que vão sendo produzidos no Brasil. Hoje, com o desenvolvimento do livro infantojuvenil ou do álbum ilustrado em geral em Portugal, há, pelo menos nas editoras mais especializadas, fortes preocupações estéticas e de produção gráfica que não existiam. Mas o objetivo fundamental (publicitário, comercial) da capa, agora como no passado, vem a ser, no essencial, o mesmo: atuar cognitiva e emocionalmente sobre o comprador potencial e eventual leitor, e para isso as gravuras devem desencadear um significativo impacto visual junto do público.

Podemos identificar na construção da capa d'O *Lagarto* outra semelhança evidente com a literatura de cordel, relacionada, obviamente com o que acabo de dizer sobre o efeito cognitivo e emocional da imagem (e não só: também os carateres e as suas cores, os seus tamanhos, toda a organização, enfim) da capa. Apesar dos discursos necessariamente dissemelhantes, o título e a gravura interagem perfeitamente e convergem numa mesma estratégia: a redução da mensagem ao essencial, primeiro, mas também a multiplicação de sentidos propostos pela inteligência e pela sensibilidade de cada leitor. Porque é o primeiro signo a ser visto (ou pelo menos aquele que mais atenção desperta, porque não é de supor que os compradores d'O *Lagarto* sejam analfabetos, como eram muitos dos compradores de folhetos portugueses ou europeus, e como eram e são ainda muitos dos compradores brasileiros de folhetos de cordel), a imagem da capa não pode deixar de revelar ou de sugerir as principais linhas do texto.

Escrevi acima que não é provável que entre os compradores d'O *Lagarto* haja algum comprador analfabeto. Mas há, com certeza, não leitores (crianças) entre os consumidores deste livro, que se inscreve na categoria de livros que atingem o seu público de eleição, ou um dos seus públicos, por meio de «mediadores que, por um lado, compram o livro e, por outro, o leem muitas vezes em voz alta

³⁷ L. Camargo, *A Ilustração do Livro Infantil*, Belo Horizonte, Editora Lê, 1995.

para ele»³⁸: os álbuns ilustrados. Estas palavras de Walter Benjamin, no texto «Visão do livro infantil», ajustam-se bem ao universo pictórico, de qualidade e originalidade inegáveis, d'O *Lagarto*: «Nesse mundo permeável, adornado de cores, [...] a criança é recebida como companheira. Fantasiada, com todas as cores que capta lendo e vendo, a criança entra no meio de uma mascarada e também participa dela»³⁹.

Dar a conhecer num livro ilustrado um texto que Saramago escreveu e publicou como crónica é um modo de revisitar e divulgar a obra de um escritor incontornável das literaturas portuguesa e universal. N'O *Lagarto*, como em toda a escrita de José Saramago, a realidade e a imaginação encontram-se perfeitamente unidas, sem que a imaginação apague o sentido da realidade, e sem que a realidade mate a beleza e o encanto que somos capazes de encontrar, criar e querer no mundo. Para Saramago, tudo aquilo que imaginamos e contamos existe, faz parte do mundo, e é por isso mais real do que muito daquilo a que chamamos realidade. Ao lerem, ao ouvirem ou ao inventarem uma história, as crianças (e não só) são atores e «cenógrafos que não se deixam censurar pelo 'sentido'»⁴⁰. Para elas, a transformação da rosa em pomba, n'O *Lagarto*, é aquilo que não pode ser dito senão por essas mesmas palavras, «é o impronunciável que paradoxalmente se pronuncia»⁴¹, é «o que diz a palavra poética»⁴², é um instante de pura e intensa realidade do imaginário e do maravilhoso: «E então a rosa moveu-se rapidamente, tornou-se branca, as pétalas mudaram-se em penas e asas – e uma pomba levantou voo para o céu azul»⁴³.

N'O *Lagarto*, diz-nos o narrador, a «história é de fadas», um conto de fadas, portanto, ou conto maravilhoso, que «é ainda hoje o primeiro conselheiro das crianças, porque foi o primeiro da humanidade, e sobrevive, secretamente, na narrativa. O primeiro narrador verdadeiro é e continua sendo o narrador de contos de fadas»⁴⁴. Mais à frente, a propósito de narrativas clássicas da literatura oral, voltarei a estas e a outras palavras de Walter Benjamin. Devemos tê-las presentes, para não esquecermos ou ignorarmos que a literatura oral e oralizante, nas suas múltiplas formas e sucedâneos, continua bem no centro da

³⁸ S. Van der Linden, *Para Ler o Livro Ilustrado*, tradução de D. de Bruchard, São Paulo, Cosac Naify, 2011, p. 29.

³⁹ W. Benjamin, *Visão do livro infantil*, in *Reflexões: a Criança, o Brinquedo, a Educação*, tradução de M. Vinicius Mazzari, São Paulo, Summus, 1984, p. 55.

⁴⁰ *Ibid.*

⁴¹ E. Lourenço, *Eugénio de Andrade ou o paraíso sem mediação*, in *Tempo e Poesia*, Porto, Editorial Inova, 1974, p. 137.

⁴² *Ibid.*

⁴³ J. Saramago, *O Lagarto*, xilogravuras de J. Borges, Porto, Porto Editora / Fundação José Saramago, 2016. Sem numeração de páginas.

⁴⁴ W. Benjamin, *O narrador. Considerações sobre a obra de Nikolai Leskov*, in *Obras Escolhidas I. Magia e Técnica, Arte e Política. Ensaios sobre Literatura e História da Cultura*, prefácio de Jeanne Marie Gagnebin, tradução de S.P. Rouanet, São Paulo, Brasiliense, 1985, p. 215.

civilização, de onde nunca saiu (apesar de a sua morte ter sido declarada, ou decretada, inúmeras vezes).

Conclusão

Nestes livros de José Saramago, o corpo e a mente do leitor mais e menos jovem articulam-se, num pacto (in)visível, com o corpo infinito do objeto-livro enquanto lugar de representação de mundos, conhecimento e construção de identidades e alteridades. Estes livros, porque ilustrados, existem para serem manuseados. Qualquer livro pede manuseamento, mas aqueles que incluem ilustrações suscitam mais diretamente esse contacto. Muitos artigos e livros foram e serão escritos sobre Saramago e sobre o lugar da sua obra na história da literatura e das ideias. As obras que aqui abordei merecem participar nesse diálogo entre a crítica e Saramago, as suas obras e os seus leitores de todas as idades.

Storia di una pratica d'insegnamento. Il 'dettato' nei programmi didattici della scuola elementare dall'Unità all'avvento del fascismo

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History of a teaching practice: dictation in Elementary School Programs from the Unification of Italy to the advent of Fascism

ABSTRACT: A historical review of the practice of dictation from the Unification of Italy to the present day brings us to understand the reasons why such practice is still widespread in Italian primary schools. An analysis spanning from the 1860 Programs to the 1905 Orlando Law allows us to highlight those indications and reflections on how to carry out dictation that, more than a century later, are still widely in use. If, at the beginning of the nascent unitary state, dictation was the privileged instrument for teaching the Italian language to a population which was mostly illiterate and speaking a multiplicity of dialects, in the early 1900s it began to assume different characteristics, opening the way to ideological dictation typical of the Fascist era.

EET/TEE KEYWORDS: Primary School; History of education; Dictation; Language Teaching; Italy; XIXth Century.

Così è avvenuto che gli insegnanti fecero e fanno dettati su dettati (spesso disdicevoli e disadatti) e credono di aver insegnato, e questo non è¹.

¹ L. Benferroni, *Insegnamento dell'ortografia nelle scuole elementari*, Torino, Paravia, 1915, p. 18.

Introduzione

Se molte, e ben più rigorose, sono le ricerche sulla storia delle istituzioni scolastiche elaborate alla luce dei Programmi Ministeriali, la peculiarità del presente lavoro può essere identificata nell'ottica specifica con la quale si cercherà di affrontare la ricerca, andando ad analizzare, tra tutti gli argomenti presenti nei testi ministeriali, soltanto la sezione relativa all'educazione linguistica nella scuola elementare, per restringere poi ulteriormente lo sguardo sul dettato. La volontà di intraprendere questa strada deriva dalla convinzione che nessuno studio o ricerca, soprattutto se relativo a una pratica, possa prescindere – per essere compreso in modo profondo – dalla sua storia. Ripercorrere dunque la pratica del dettato permette di avere maggiore consapevolezza critica nei confronti di quei comportamenti, pensieri e motivazioni che caratterizzano tuttora il dettato e che, se non sono il frutto dell'estro e della creatività degli insegnanti, derivano dal perpetuarsi di un'attività, a volte anche inconsapevole, che si è tramandata nei secoli. Si è certamente consapevoli che, non sempre, la pratica delle insegnanti rispecchi quanto i Programmi esprimono; vi è infatti un “sapere pratico” dei docenti che va oltre le prescrizioni statali e che spesso orienta l'azione in modo più determinante di quanto non facciano i programmi stessi. Tuttavia, dalla lettura dei Programmi Ministeriali e delle Indicazioni annesse, è possibile rintracciare alcuni elementi che, ancora oggi, caratterizzano tale pratica.

In questo excursus storico non ci si è potuti esimere dal prendere in considerazione anche alcuni cambiamenti sociali e politici che hanno caratterizzato la storia del nostro Paese.

Occorre sgombrare la mente dall'idea che a determinare i programmi di insegnamento siano soltanto le teorie pedagogiche e didattiche; insieme con esse, e spesso con influenza decisiva concorrono invece, la situazione politica, gli orientamenti sociali, la struttura statale, il costume, i rapporti di convivenza².

1. Il dettato come strumento di alfabetizzazione di massa: la Legge Casati e i Programmi del 1860

Con il motto “alfabetizzare, alfabetizzare” può essere riassunto il compito affidato alla scuola elementare pubblica italiana che, arrivata in ritardo rispetto agli altri Stati europei³, è considerata una delle grandi conquiste

² D. Bertoni Jovine, *Storia della didattica dalla legge Casati ad oggi*, a cura di A. Semeraro, Roma, Editori Riuniti, 1976, p. 177.

³ In Italia una spinta decisiva verso la creazione di istituzioni di massa si ebbe solo con la

dell'Ottocento. Dopo l'Unità d'Italia, il problema dell'istruzione non era più rimandabile, soprattutto in un contesto caratterizzato dalla presenza di un alto tasso di analfabetismo oltre che da una notevole varietà linguistica ereditata dall'esistenza, sul territorio nazionale, di una molteplicità di Stati e popolazioni differenti. I dati del primo censimento italiano del 1861, che considerava alfabetizzati coloro che erano capaci di tracciare almeno la propria firma, appaiono sconcertanti: il 70% della popolazione risultava infatti analfabeta, con punte del 90% nel sud della penisola⁴. Era necessario quindi intraprendere una vera e propria battaglia contro l'analfabetismo utilizzando tutti gli strumenti a disposizione. Il primo di questi può essere considerata la Legge Casati promulgata nel 1859⁵ per riformare la Scuola del Regno di Sardegna e poi assunta nel 1861⁶ come strumento di politica scolastica a disposizione del nascente stato italiano⁷; come sostiene Dina Bertoni Jovine, anche se la legge Casati fosse stata la migliore delle leggi, avrebbe ugualmente incontrato le difficoltà a cui è andata incontro a causa delle circostanze in cui fu applicata e per l'arretratezza della maggior parte delle province italiane⁸.

Gli elementi di criticità ravvisati nella Legge Casati misero in luce l'impreparazione del nascente stato italiano di fronte a un problema come quello dell'istruzione che poteva essere considerato parte di una difficoltà e di una preoccupazione più ampia, politica e sociale – volta cioè all'unificazione nazionale e alla conquista di una lingua comune – di cui la lotta all'analfabetismo costituisce uno dei principali aspetti. I promulgatori della legge Casati avevano sicuramente ravvisato in essa la possibilità di diffondere una lingua nazionale capace di creare quell'unità politica e sociale che, sancita sulla carta, era ancora lontana dall'essere una realtà di fatto. Per questo motivo la Legge si basava più su un'idea di lingua nazionale, vicina alle posizioni manzoniane, che di lingua del popolo veicolata principalmente dal romanticismo tedesco e inglese che però, in un contesto come quello italiano, caratterizzato da una varietà di popolazioni, avrebbe dovuto essere declinata in lingue del popolo⁹. Tale idea di lingua nazionale, di cui la scuola elementare doveva essere “dispensatrice”,

dominazione napoleonica; in Inghilterra e in Germania, già nel Cinquecento, vi fu una decisa lotta contro l'analfabetismo (anche grazie alla riforma protestante); in Francia, invece, ancora nel Settecento vi erano posizioni diffidenti (si veda per esempio Voltaire) nei confronti dell'istruzione dei contadini. Cfr. T. De Mauro, *Storia linguistica dell'Italia Unita*, Bari, Laterza, 1965.

⁴ E. Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, Firenze, La Nuova Italia, 1990.

⁵ R.D. 13 novembre 1859, n. 3725.

⁶ R.D. 28 novembre 1861, n. 347.

⁷ Per la ricostruzione dell'iter attraverso il quale si giunse alla formulazione della Legge Casati si veda M.C. Morandini, *Da Boncompagni a Casati: la costruzione del sistema scolastico nazionale (1848-1861)*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita*, Brescia, La Scuola, 2001, pp. 9-46.

⁸ Bertoni Jovine, *Storia della didattica dalla legge Casati ad oggi*, cit.

⁹ Cfr. P.E. Balboni, *Storia dell'educazione linguistica in Italia. Dalla legge Casati alla riforma Gelmini*, Novara, Utet-De Agostini Scuola, 2009.

appare tuttavia come monolitica, cristallizzata nell'italiano formale e quindi lontana dalle varietà dialettali che caratterizzavano le province italiane, incapace di attecchire tra le masse popolari che dovevano essere alfabetizzate.

Per comprendere meglio come il nascente stato italiano si impegnasse in quello che può essere considerato un tentativo di "alfabetizzazione a tappeto", è necessario addentrarsi nel testo dei diversi Programmi Ministeriali e nella lettura delle Indicazioni metodologiche annesse e che, forse più dei programmi stessi, forniscono un'idea chiara della metodologia e delle richieste che venivano avanzate ai maestri per raggiungere il grande obiettivo dell'insegnamento della lingua nazionale.

I Programmi del 1860¹⁰, che realizzavano i dettami della legge Casati, e le *Istruzioni* per i maestri redatte dall'ispettore Fava¹¹, allegate ai programmi, si proponevano come primo obiettivo quello di contribuire all'unificazione linguistica e culturale dell'Italia unita attraverso una chiara indicazione di quelle che dovevano essere, per importanza, le materie e i contenuti da insegnare: il catechismo e la storia sacra, la grammatica e la composizione italiana, l'aritmetica e il sistema metrico-decimale¹².

Relativamente all'insegnamento della lingua italiana, a partire dalla prima classe, vengono indicati esercizi graduati di sillabazione, spiegazione dei vocaboli letti, formazione di lettere, sillabe e parole per imitazione oltre che la scrittura di parole sotto dettatura¹³. In particolar modo, si legge, il maestro dovrà iniziare con l'insegnamento della lettura utilizzando i cartelloni e il sillabario, facendo conoscere ai bambini le vocali, i dittonghi e successivamente le consonanti da associare alle vocali, seguendo la graduazione prevista dai cartelloni¹⁴. L'insegnamento dovrà seguire un andamento dal facile al difficile, partendo dalle sillabe semplici e passando gradatamente alle più difficili attraverso continui esercizi basati, principalmente, sull'imitazione del maestro.

¹⁰ R.D. 15 settembre 1860, n. 4336.

¹¹ *Istruzioni ai maestri delle Scuole primarie sul modo di svolgere i Programmi approvati*, in Catarsi, *Storia dei programmi della scuola elementare (1860-1885)*, cit.

¹² Nella prima classe, sia per la sezione inferiore che superiore, le materie previste erano: religione, lingua italiana, aritmetica; dalla seconda classe in poi, oltre a quelle citate, viene aggiunta la sezione "Lettura" all'interno della quale vengono introdotti contenuti di geografia, storia e nozioni elementari di scienze fisiche. Cfr. *Programmi per la scuola elementare annessi al regolamento del 15 settembre 1860*, in Catarsi, *Storia dei programmi della scuola elementare (1860-1885)*, cit.

¹³ *Istruzioni ai maestri delle Scuole primarie sul modo di svolgere i Programmi approvati*, cit.

¹⁴ Dal 1861 al 1875 si registra un picco numerico nella produzione di abbecedari e libretti di esercizi di lettura che, generalmente, erano divisi in due parti: una prima parte che introduceva le vocali e le semiconsonanti per poi passare all'illustrazione dei dittonghi, delle sillabe dirette e di quelle inverse e una seconda parte comprendente brevi testi narrativi con semplici frasi o racconti morali, con lo scopo di sviluppare il lessico dei bambini. Cfr. A. Barausse, *Learning to read and write in Italy in the second half of the nineteenth century. Primers and reading exercise booklets: publication, ministerial control and teaching (1861-1898)*, «History of Education & Children's Literature», vol. IX, n. 2, 2014, pp. 109-149.

Per l'apprendimento della scrittura sono fondamentali la postura e l'impugnatura della penna: si dovrà procedere dal disegnare aste e curve, dalle quali avranno origine le lettere più semplici, per arrivare poi a quelle più difficili «passando prima pei vari ordini delle lettere minuscole, indi delle maiuscole e, per ultimo delle cifre numeriche»¹⁵. Nella sezione superiore della prima classe si proseguirà con gli esercizi di sillabazione da alternarsi con la lettura che deve diventare sempre più spedita, legando insieme le sillabe e prestando attenzione alla corretta pronuncia delle parole.

In questi primi programmi post-unitari viene data grande importanza alla grammatica¹⁶, che il maestro dovrà iniziare a spiegare a partire dalla seconda classe, quale strumento essenziale per dare a tutti gli italiani una lingua comune:

L'insegnamento grammaticale dovrà pigliare le mosse dall'analisi di proposizioni semplici contenute nel libro di lettura, facendo il maestro in esse notare il soggetto, l'attributo ed il verbo, spiegando l'ufficio del nome, dell'aggettivo e del verbo, e addestrando gli alunni a formar simili proposizioni da sé¹⁷.

L'insegnante proseguirà quindi con le proposizioni complesse e composte limitandosi però solo al complemento diretto e indiretto, senza addentrarsi nelle numerose suddivisioni; l'analisi grammaticale sarà lo strumento attraverso il quale, prima oralmente e poi per iscritto, l'insegnante farà esercitare gli alunni una volta che abbiano imparato a riconoscere le varie parti del discorso. Si raccomanda però di non insistere troppo con l'analisi grammaticale soprattutto come esercizio isolato.

Il più utile e importante esercizio grammaticale in questa classe è la coniugazione orale e talvolta anche iscritta, per proposizioni, dei verbi regolari e di molti irregolari al passato remoto, l'uso dei quali è frequentissimo¹⁸.

Interessante notare come, a distanza di 160 anni dalla pubblicazione delle *Istruzioni* dell'ispettore Angelo Fava, molta parte dell'insegnamento della grammatica nelle scuole di oggi si realizzi seguendo questa gradualità e riservando molta importanza al riconoscimento delle varie parti del discorso, nonché alla declinazione dei verbi regolari e irregolari che riempiono buona parte dei quaderni dei nostri alunni a partire, tendenzialmente, dalla terza classe della Scuola Primaria.

¹⁵ *Istruzioni ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati*, cit., p. 189.

¹⁶ La grande attenzione riposta nei confronti della grammatica trova le sue radici nella traduzione della scuola gesuitica che considerava la scuola elementare come propedeutica al ginnasio e quindi alla scuola di grammatica.

¹⁷ *Istruzioni ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati*, cit., p. 191.

¹⁸ *Ibid.*, p. 192.

Per rendere però effettivo l'apprendimento della lingua italiana, soprattutto per quanto riguarda l'insegnamento della lingua scritta, non sembrano tuttavia sufficienti né gli esercizi di sillabazione e formazione delle parole, né gli esercizi di analisi grammaticale: gran parte dell'insegnamento della scrittura avviene utilizzando la tecnica del dettato, quale strumento fondamentale per alfabetizzare la massa popolare analfabeta. I Programmi del 1860 ricorrono all'uso del dettato in tutte le classi, dalla sezione inferiore della prima classe, fino alla quarta classe; nonostante nei programmi si faccia esplicito riferimento al dettato solo fino alla seconda classe, nelle *Istruzioni* annesse al testo programmatico si trovano esercizi di dettatura anche nella classe quarta.

Nel dettare le sillabe e le parole farà sempre in modo che dalla retta e spiccata sua pronunzia i fanciulli possano ben rilevare le doppie e gli accenti, e non incontri che per vizio della medesima abbiano poi a scrivere monche e scorrette le parole. I quali esercizi dovranno per quanto possibile rispondere di mano in mano a quelli fatti nella lettura, perché gli uni agli altri servano d'aiuto e di compimento¹⁹.

Con queste istruzioni l'ispettore Fava sembra essere consapevole che la traduzione da fonema in grafema non sia automatica e scevra da rischi ma che vi sia un'alta possibilità di errore soprattutto in un contesto scolastico, come quello post-unitario, in cui molti insegnanti parlano in dialetto e non hanno una conoscenza sufficiente della lingua italiana: il rischio quindi che le inflessioni dialettali siano causa di errori nel momento della transcodifica è molto alto.

Se attualmente nessun insegnante si azzarderebbe a fare un dettato in dialetto, queste indicazioni di 160 anni fa non appaiono così distanti se si considera che le varietà regionali dell'italiano, le differenze di accentazione e di flessione sono inevitabilmente presenti nella parlata di ogni insegnante: se il dettato fosse una vera operazione di transcodifica in cui ogni alunno traduce in grafema ciascun fonema, i bambini veneti, per esempio, dovrebbero scrivere molte parole senza doppie, mentre quelli appartenenti alle regioni meridionali dell'Italia sarebbero tenuti a raddoppiare i fonemi /b/, /d/ e /t/ anche dove non presenti²⁰.

Da non sottovalutare, inoltre, l'affermazione che «dalla retta e spiccata sua pronunzia i fanciulli possano ben rilevare le doppie e gli accenti»; pare a questo punto legittimo domandarsi se per retta e spiccata pronuncia si intenda che l'insegnante debba evitare, come detto prima, qualsiasi flessione dialettale o fare in modo che, grazie a una pronuncia particolare, il bambino senta la presenza delle doppie e degli accenti. Tale domanda risulta tutt'altro che banale se si considera quanto sia ancora attuale l'atteggiamento di molti insegnanti di allungare, mentre dettano, il suono delle consonanti doppie o di pronunciare più forte l'accento tonico sull'ultima sillaba, così da evitare che i bambini cadano in

¹⁹ *Ibid.*, p. 189.

²⁰ R. Eynard, *Piccola guida allo scrivere: facciamo ancora il dettato?*, «L'Educatore», vol. XXXIX, n. 14-15, 15 Febbraio 1992, pp. 18-20.

errore; in questo modo si crea, tuttavia, una pratica fittizia di scrittura poiché, nella vita quotidiana, nessun bambino sentirà pronunciare in quel modo le parole; siamo quindi di fronte a una situazione di scrittura che è propria della vita scolastica ma lontana dallo scrivere reale²¹.

Continuando nella lettura delle *Istruzioni* del 1860, le indicazioni relative alla pratica del dettato proseguono anche nelle classi superiori; nella sezione superiore della prima classe l'ispettore Fava scrive:

Dopo di aver per alcuni giorni ripetuto gli esercizi della sezione inferiore, il maestro addestrerà i fanciulli a scrivere sotto dettatura; e porrà gran diligenza nel correggere gli errori di ortografia, avvertendo che, più delle regole, giova a schivarli l'abitudine che si sarà fatto egli medesimo di pronunziar rettamente le parole che viene loro dettando²².

Oltre al richiamo alla retta pronuncia, da sottolineare risulta essere il termine "addestrerà" che porta con sé un'idea di apprendimento meccanico e trasmissivo in cui poco spazio viene lasciato al ragionamento o all'elaborazione mentale dell'alunno, in antitesi forse con l'importanza che a tale pratica viene data nelle *Istruzioni* stesse.

Passando alle classi superiori, in particolare nella seconda e nella quarta classe, il dettato diventa una tecnica strumentale all'avviamento alla composizione scritta o all'insegnamento della grammatica; si legge infatti:

Per avviare gli alunni a comporre da sé, bisogna anzitutto avvezzarli ad esprimere a voce in modo conveniente e corretto i propri pensieri [...], medesimamente li addestri a dettar brevi descrizioni di oggetti altre volte analizzati, e raccontini morali da lui prima narrati²³.

E ancora, in classe quarta:

Fra gli esercizi grammaticali a cui i maestri potranno addestrare i loro allievi, non sarà inutile il dettare a quando a quando alcuni periodi in cui siano errori di costruzione o di ortografia o di punteggiatura o di lingua; non solo perché si correggano, ma ancora perché siano esattamente esposti i motivi delle correzioni²⁴.

Il processo di alfabetizzazione non si ferma quindi nel momento in cui il bambino ha appreso il meccanismo di traduzione dei fonemi in grafemi ma continua con l'apprendimento della composizione scritta e della grammatica.

Nel primo stralcio non è chiaro se l'alunno debba dettare al maestro o ai compagni il frutto del proprio pensiero: in entrambi i casi, tuttavia, il rapporto tra oralità e scrittura appare molto stretto tanto che, per imparare a comporre,

²¹ Per un approfondimento sull'analisi della pratica del dettato nelle classi prime delle Scuole Primarie si veda, E. Farina, *Il dettato nella scuola primaria. Analisi di una pratica di insegnamento*, Milano, FrancoAngeli, 2014.

²² *Istruzioni ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati*, cit.

²³ *Ibid.*, p. 192.

²⁴ *Ibid.*, p. 195.

sembra necessario saper dettare; esprimersi correttamente significa dunque saper dettare ciò che si ha in mente.

Nel secondo stralcio invece il dettato è semplicemente funzionale a quella che, in termini moderni, potrebbe essere chiamata riflessione linguistica; la pratica di dettare frasi che contengano errori sintattici, ortografici o di punteggiatura affinché il bambino li corregga ed esprima i motivi della correzione non sembra lontana neppure dalla pratica attuale: la differenza forse consiste nel fatto che, nel ventunesimo secolo, al posto di dettare le frasi l'insegnante può permettersi, più semplicemente, di consegnare una fotocopia.

2. *Dettato ortografico e ortoepia: la lotta ai dialetti nei Programmi Coppino*

Se i Programmi del 1860, nonostante l'intento di diffondere l'insegnamento della lingua italiana, non facevano esplicito riferimento ai dialetti, affermando semplicemente che la lingua dovesse essere l'italiano e i maestri erano obbligati a parlarla, la parziale revisione²⁵ che degli stessi viene effettuata dal Ministro Coppino²⁶ nel 1867²⁷ si propone come primo obiettivo, per quanto riguarda l'insegnamento dell'italiano, quello di estirpare i dialetti considerati solo come fonte di errore. L'Inchiesta Matteucci del 1864-65 sulle condizioni della Pubblica Istruzione nel Regno d'Italia aveva messo in luce gli scarsi risultati della precedente legge nella diffusione della lingua italiana e nella lotta contro l'analfabetismo. Il quesito n. 9 di tale inchiesta è proprio finalizzato alla ricognizione dell'uso del dialetto nelle diverse scuole del Regno: «Nelle scuole si usa il dialetto o la lingua italiana, e questa si parla 'senza gravi scorrezioni'?»²⁸. Il panorama che ne emerge è piuttosto differenziato: se in alcuni capoluoghi la lingua italiana è parlata con una discreta correttezza, nelle scuole rurali, di

²⁵ Di fatto le modifiche non furono sostanziali tanto che la struttura della scuola rimase inalterata; si trattò di un'opera di sfrondamento e semplificazione dei vecchi programmi, soprattutto per l'insegnamento della lingua italiana e della matematica. Per quest'ultima si richiedeva agli alunni di apprendere solamente le quattro operazioni mentre per la lingua italiana veniva eliminata l'analisi logica e ridimensionata anche l'importanza di quella grammaticale.

²⁶ Il ministro Michele Coppino emanerà, dieci anni dopo, durante il periodo di governo della Sinistra storica, la Legge del 15 luglio 1877 n. 3961 che elevava a tre anni l'obbligo scolastico. Per approfondire l'iter della Legge Coppino e il dibattito che fu avviato in Parlamento si veda G. Talamo, *Istruzione obbligatoria ed estensione del suffragio*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al centro-sinistra*, Brescia, La Scuola, 2001, pp. 47-74; S. Santamaita, *Storia della scuola*, Milano, Bruno Mondadori, 2010.

²⁷ *Istruzioni e programmi per l'insegnamento della lingua italiana e dell'aritmetica nelle scuole elementari*, R.D. 10 ottobre 1867.

²⁸ Cfr. *Sulle condizioni della pubblica istruzione nel Regno d'Italia. Relazione generale presentata al Ministro del Consiglio Superiore di Torino*, Milano, Stamperia Reale, 1865, p. 473.

montagna, nelle borgate e nei piccoli comuni, la lingua usata è il dialetto. La sintesi che arriva da Milano risulta eloquente:

Sgraziatamente nelle scuole, intendo sempre le rurali, si usa il dialetto. La lingua italiana i maestri non la conoscono e non vogliono utilizzarla, difendendosi colla scusa, che i loro alunni non l'intendono²⁹.

Solo nella provincia di Lucca e in alcune zone dell'Italia Centrale sembra esserci un uso più corretto dell'italiano che, tuttavia, in altre zone d'Italia non sempre è padroneggiato dagli stessi insegnanti.

La vera novità dei nuovi programmi consiste, dunque, nel riconoscimento del dialetto, non tanto per il suo valore antropologico, quanto, piuttosto, per essere fonte di errore da eliminare il prima possibile attraverso esercizi di ortofonia. Data la stretta relazione esistente tra il parlare e lo scrivere, secondo il ministro Coppino, i difetti della pronuncia passano, senza rendersene conto, anche nello scrivere; il tempo che il maestro dedicherà all'ortofonia sarà successivamente guadagnato nel momento in cui si inizierà l'insegnamento dell'ortografia. Per questo motivo:

[...] ciò che ha in queste classi una capitale importanza, è lo studio e l'apprendimento della lingua italiana. Ad esso vuole essere diretto ogni sforzo di un savio istitutore. Usi egli sempre della lingua patria insegnando, ed obblighi con frequenti colloqui i giovinetti a fare altrettanto, e corregga con amorevole pazienza le imperfezioni provenienti dal dialetto della provincia. E ciò è da fare fin dal primo giorno che i fanciulli entrano nella prima classe; e delle voci del dialetto vuolsi far uso solo a necessaria dichiarazione delle parole italiane non ancora note agli alunni³⁰.

Ortografia che, secondo il ministro, deve essere un requisito essenziale per praticare il dettato grazie al quale i bambini devono, anche velocemente, imparare a scrivere. La preoccupazione del tempo impiegato dagli alunni per compiere l'operazione di traduzione da fonema a grafema è oggetto del quesito n. 2 dell'Inchiesta Matteucci in cui si chiede agli insegnanti: «In quanto tempo (i bambini) apprendono a scrivere sotto dettato senza che 'il dettante divida le parole in sillabe'?»³¹. Anche a questa domanda le risposte risultano differenti a seconda delle zone d'Italia e, generalmente, si riportano esperienze in cui i bambini apprendono a scrivere sotto dettatura dopo un anno (Porto Maurizio) «se si abbia cura di evitare le parole di più difficile sillabazione»³² e situazioni in cui tale pratica viene acquisita in tre anni (Milano). Il fatto che nella stessa Inchiesta vi sia una domanda così esplicita su tale pratica denota quanto il

²⁹ *Ibid.*, p. 474.

³⁰ *Istruzioni e programmi per l'insegnamento della lingua italiana e dell'aritmetica nelle scuole elementari* (1867), cit., p. 201.

³¹ Cfr. *Sulle condizioni della pubblica istruzione nel Regno d'Italia. Relazione generale presentata al Ministro del Consiglio Superiore di Torino*, cit., p. 457.

³² *Ibid.*, p. 458.

dettato fosse indispensabile ed esplicitamente richiesto per l'apprendimento della lingua italiana. La specifica: «senza che il dettante divida le parole in sillabe» pone l'attenzione sulla modalità di dettatura dell'insegnante che non doveva, in questo modo, facilitare il bambino nell'operazione di transcodifica; pratica questa, della divisione in sillabe, che ancora oggi è possibile osservare in alcune scuole in cui l'insegnante detta sillabando – soprattutto se ritiene che le parole siano difficili per gli alunni – oppure chiede che siano gli alunni stessi, battendo le mani in coro, a dividere in sillabe la parola da scrivere³³.

Vista l'importanza attribuita al dettato e le richieste di conoscere persino i tempi e la modalità di dettatura delle insegnanti, lo sfoltimento, operato dal ministro Coppino nei Programmi per l'insegnamento della lingua italiana, è ravvisabile solo sulla carta: il dettato non trova spazio nella parte delle *Istruzioni* mentre compaiono diverse diciture nei Programmi: si passa dalla «scrittura di parole dettate per via delle sillabe semplici» previste per la sezione inferiore della prima classe, agli «esercizi di scrittura per imitazione e sotto dettatura»³⁴ della sezione superiore. Nella seconda classe, accanto agli esercizi di dettatura compaiono anche quelli di ortografia; nella classe terza e quarta non si fa più esplicito riferimento alla pratica del dettato.

3. *Luci ed ombre dei Programmi Gabelli: il dettato e l'importanza della correzione*

La pratica del dettato ritorna con forza nei corposi programmi del 1888³⁵, più comunemente conosciuti come Programmi Gabelli, nonostante gli stessi si pongano come guida per un rinnovamento metodologico della didattica quotidiana. Le *Istruzioni*, annesse ai Programmi³⁶, costituiscono un vero e proprio trattatello di pedagogia positivista che pone al centro la questione del metodo: la scuola deve fornire ai bambini gli strumenti che consentano

³³ Si vedano, a questo proposito, gli esempi riferiti alla modalità di dettatura delle insegnanti contenuti in Farina, *Il dettato nella scuola primaria. Analisi di una pratica di insegnamento*, cit.

³⁴ *Istruzioni e programmi per l'insegnamento della lingua italiana e dell'aritmetica nelle scuole elementari* (1867), cit., pp. 203-204.

³⁵ R.D. 25 settembre 1888, n. 5724.

³⁶ È presente una stridente diversità fra il testo dei programmi veri e propri e la parte delle *Istruzioni* affidata al pedagogista bellunese: nel passare dalle *Istruzioni generali* a quelle speciali, nonché ai contenuti analitici dei Programmi, la pedagogia e il metodo di insegnamento di Gabelli, motore di un tentativo di rinnovamento della scuola italiana, perdono i loro principi ispiratori. In questi Programmi si avverte, forse più che in altri momenti della storia della scuola elementare, lo scarto tra teoria e pratica scolastica, «fra l'elaborazione di un ambizioso progetto d'insegnamento e la contemporanea dichiarazione del suo fallimento pragmatico, della sua inattualità storica, della sua collocazione immediata, anzi preventiva, nell'area della utopia pedagogica». Cfr. B. Incatasciato, *Leggere, scrivere, far di conto. Per una storia della didattica nella scuola elementare in L'istruzione di base in Italia (1859-1977)*, Firenze, Vallecchi, 1978, p. 142.

loro, in futuro, di poter apprendere autonomamente dall'esperienza così che l'alunno diventi maestro di se stesso. Gli obiettivi che il ministro individuò come fondamentali per la scuola elementare possono essere riassunti nelle tre espressioni: vigore del corpo, rettitudine d'animo e penetrazione dell'intelligenza. Al perseguimento di quest'ultimo obiettivo contribuiva in maniera sostanziale l'insegnamento dell'italiano che, per il discorso che qui stiamo affrontando, costituisce l'ambito da approfondire in modo più dettagliato: proprio nelle *Istruzioni* relative a questo insegnamento si concentrano le innovazioni, ma anche le contraddizioni più significative del testo programmatico³⁷.

In primo luogo, come sottolinea Balboni, i Programmi Gabelli risultano innovativi da un punto di vista linguistico; rispetto a quelli precedenti in cui, come già accennato, le idee dei grandi pensatori erano state tradotte in formulette e ricette che poco conservavano delle idee originali³⁸, il nuovo testo, e soprattutto le *Istruzioni*, esprimono meglio che in passato il pensiero dei grandi pedagogisti. La ricchezza e il linguaggio delle *Istruzioni* saranno successivamente motivo di critica poiché difficilmente comprensibili e applicabili da parte di un corpus docente che non era ancora culturalmente adatto al compito che svolgeva³⁹.

Le novità più significative per quanto riguarda l'insegnamento dell'italiano sono ravvisabili, a mio avviso, nell'insegnamento della grammatica che è da «farsi assai poco»⁴⁰, non perché non sia importante, ma poiché è possibile insegnarla praticamente.

³⁷ A conferma di tale contraddizione si veda anche lo studio dei lemmi contenuti nelle *Istruzioni* e nei Programmi, ad opera di Marco Civra. Non sembra tuttavia esserci, anche tra gli studiosi, una posizione concorde in merito alle contraddizioni visibili nel testo ministeriale. Cfr. M. Civra, *I programmi della scuola elementare dall'Unità d'Italia al 2000*, Torino, Valerio Editore, 2002, pp. 48-49.

³⁸ Nei programmi precedentemente stilati era possibile ravvisare il forte influsso, per quanto riguarda l'insegnamento in generale e anche quello della lingua, da parte dei grandi pensatori (l'antiverbalismo rousseauiano, la lingua materna di Pestalozzi, l'idea della lingua come ginnastica del pensiero di Girard). Cfr. Balboni, *Storia dell'educazione linguistica in Italia. Dalla legge Casati alla riforma Gelmini*, cit.

³⁹ Nonostante la formazione dei maestri continui a costituire una nota dolente nel processo di diffusione dell'istruzione popolare, nell'ultimo ventennio del XIX secolo vengono presi provvedimenti da parte della Pubblica Istruzione al fine di migliorare la preparazione professionale e culturale degli insegnanti della scuola elementare; a tale scopo si ricordino le Conferenze Pedagogiche che, a partire dal 1881, sono finalizzate alla promozione di un continuo aggiornamento degli insegnanti. Per approfondire la formazione dei maestri si vedano: G. Chiosso, *Istruzione primaria e condizione dei maestri tra Otto e Novecento*, in M. Cattaneo, L. Pazzaglia (edd.), *Maestri educazione popolare e società in "Scuola Italiana Moderna"*, 1893-1993, Brescia, La Scuola, 1997; A. Ascenzi, *Da plebe a popolo: l'insegnamento della storia nazionale nella scuola elementare dalla Legge Casati alla fine del secolo XIX*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento*, Milano, Vita e Pensiero, 2003, pp. 119-194; C. Ghizzoni, *Il Maestro nella scuola elementare italiana dall'Unità alla Grande Guerra*, in *ibid.*, pp. 19-79.

⁴⁰ *Riforma dei programmi delle scuole elementari (1888)*, in Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, cit., p. 212.

A quanto la pratica serva, può vederla ognuno nel fatto, che un bambino di sei anni la osserva discretamente nel suo discorso, senza averne neppure sentito il nome. Quando il maestro parli la lingua, e non il dialetto, come è suo dovere, e la parli correttamente, senza pensarvi insegna grammatica, come senza pensarvi il bambino l'impara⁴¹.

Con questa affermazione non possiamo non riconoscere a Gabelli una spiccata sensibilità pedagogica e, ancor più, glottodidattica che, circa ottant'anni dopo, troveremo in quei linguisti che a lungo si opporranno all'insegnamento tradizionale della grammatica⁴². L'intuizione di un apprendimento della grammatica che parta, prima di tutto, dai fenomeni linguistici così come si presentano mentre si parla, è per l'epoca sicuramente innovativa; emerge inoltre il concetto di insegnamento implicito che si realizza solamente con un parlare corretto da parte dell'insegnante senza che questi predisponga una vera e propria azione formalizzata.

Ancor più innovativa appare la posizione nei confronti dell'analisi logica che «va assolutamente sbandita» poiché gli alunni, non comprendendola, non trarranno alcun giovamento rischiando, al contrario, di perdere il piacere per lo studio. Non meno illuminanti si presentano le considerazioni riguardanti la composizione scritta in cui si chiede agli insegnanti una scelta accurata dei temi da proporre affinché «gli alunni non siano mai obbligati a scrivere cose che non conoscono per esperienza loro propria»⁴³; sotto accusa è il tradizionale tema su argomenti lontani dalla vita e dall'esperienza che gli alunni possono conoscere attraverso l'osservazione e i cinque sensi.

Nulla è più ripugnante del metodo che si raccomanda in questi programmi, di una descrizione del mare fatta da chi è vissuto sempre sulle montagne, o da una delle montagne da chi crebbe sulla spiaggia del mare⁴⁴.

Accanto a questa posizione illuminata nei confronti della grammatica, precorritrice dei tempi, contrasta la posizione assunta da Gabelli proprio nei confronti della pratica del dettato, della memorizzazione e dell'attenzione da porre alla calligrafia, tutte espressioni di esperienze didattiche dal carattere esclusivamente trasmissivo, ben lontane dallo spirito positivistico e dal metodo auspicato nelle *Istruzioni*.

Grandissimo uso è da fare della dettatura, esercizio prezioso, in quanto avvezza l'alunno a interpretare il suono della parola e a trovare i segni per riprodurla in iscritto. Esso è raccomandabile in tutte le classi, ma specialmente nelle inferiori, a patto però, che dettato

⁴¹ *Ibid.*, p. 212.

⁴² Mi riferisco alla lotta contro l'insegnamento tradizionale della grammatica e "grammaticalismo" soprattutto ad opera dei promulgatori delle Dieci Tesi per l'Educazione Linguistica Democratica del 1975. A questo proposito si veda T. De Mauro, *L'educazione linguistica democratica*, Bari-Roma, Laterza, 2018.

⁴³ *Riforma dei programmi delle scuole elementari* (1888), cit., p. 212.

⁴⁴ *Ibid.*

un brano, sulle prime di proposizioni staccate, poi d'un periodo o due, il maestro esamini alcuni dei quaderni correggendo gli errori. Senza la cura del correggere, il dettare torna peggio che inutile, come mostra il fatto, che non di rado alcuni perfino della classe IV, di due parole ne fanno una, e di una due, ossia scrivono suoni privi di senso⁴⁵.

Gabelli è dunque convinto dell'importanza del dettato quale strumento per l'apprendimento della lingua italiana soprattutto per l'attività di transcodifica che esso richiede. Il fatto che l'alunno debba «interpretare» il suono prima di convertirlo in segno significa che la traduzione fonema-grafema non è un'azione alla quale basta «addestrare» gli alunni, come i programmi precedenti affermavano, ma implica un processo cognitivo più complesso. Nuova rispetto al passato è anche l'attenzione alla fase di correzione dei quaderni che, se assente, rende inutile la pratica stessa del dettato; secondo Gabelli è proprio la mancanza di correzione dell'insegnante a provocare il perpetuarsi di quegli errori che oggi chiameremmo di ipo e ipersegmentazione⁴⁶. Per evitare tali sbagli l'insegnante deve, tuttavia, dettare seguendo un ritmo ben diverso rispetto al parlato; nessuno infatti mentre parla farebbe delle pause significative per far comprendere dove termina una parola e dove inizia quella successiva; espressioni come «la mamma» piuttosto che «con te» vengono sentite come un'unica unità senza la percezione di uno spazio tra la prima e la seconda parola.

Ancora più stridenti rispetto all'anima positivista dei programmi appaiono le sottolineature sull'importanza degli esercizi di memoria «senza l'aiuto della quale è vana ogni fatica per imparare» e l'attenzione posta nei confronti della scrittura e della calligrafia da esercitare con ripetuti esercizi da eseguire lentamente, con esattezza, così da mantenere i quaderni puliti, senza imprecisioni poiché la calligrafia, insieme al disegno «ha la mira indiretta di educare all'attenzione, alla precisione, alla pazienza e all'amore dell'ordine, quali sono tutti utili nella vita giornaliera [...]»⁴⁷.

4. Il dettato tra insegnamento dell'ortografia e trasmissione di conoscenze e valori: dai Programmi Baccelli alla Legge Orlando

In una valutazione complessiva, questi elementi di contraddizione presenti nei Programmi del 1888 risultano sicuramente di carattere minoritario rispetto allo spirito innovativo che animava soprattutto il testo delle *Istruzioni*, tanto

⁴⁵ *Ibid.*

⁴⁶ Con questi due termini ci si riferisce a quegli errori legati alla segmentazione delle parole; es. «difretta» o «in sieme» tipici dei bambini in fase di acquisizione della lingua scritta. Per una conoscenza approfondita dell'argomento si veda E. Ferreiro, C. Pontecorvo (edd.), *Cappuccetto rosso impara a scrivere. Studi psicolinguistici in tre lingue romanze*, Firenze, La Nuova Italia, 1996.

⁴⁷ *Riforma dei programmi delle scuole elementari (1888)*, cit., p. 213.

che furono proprio questi aspetti di novità a preoccupare gli insegnanti che vedevano i nuovi Programmi come troppo complessi e di difficile realizzazione. Ai timori degli insegnanti si aggiunse l'opposizione della classe aristocratica e moderata secondo la quale era proprio l'istruzione la causa prima dell'aumento della delinquenza e della criminalità sul territorio nazionale⁴⁸. La colpa principale dei Programmi Gabelli era infatti quella di diffondere idee troppo progressiste che alimentavano il malcontento popolare; le finalità dei Programmi di "formare delle teste" e sviluppare negli alunni il pensiero critico attraverso "fatti e non parole" sarebbero state la causa, secondo la classe dominante, dei pericolosi fermenti che nascevano in seno alla classe popolare. L'intento quindi del Ministro Baccelli, incaricato nel 1894 di redigere nuovi Programmi⁴⁹, fu quello di incarnare uno spirito conservatore riassumibile nella formula da lui stesso coniata: «istruire il popolo quanto basta, educarlo più che si può»⁵⁰. L'opera di Baccelli, in sintonia con lo spirito conservatore, fu quello di sfrondate i Programmi del 1888 da tutte quelle discipline ed esercizi che si allontanavano dall'obiettivo primo della scuola elementare del «leggere, scrivere, far di conto e diventare un galantuomo operoso»⁵¹. Di fatto non si trattò di una vera e propria riduzione dei Programmi precedenti ma di una modifica e, in alcuni casi, anche di un'aggiunta di nuove attività ed esercizi, come per esempio quello della dettatura in tutte le classi e in tutte le prove d'esame finale. Tra le varie discipline il primato venne riconosciuto alla lingua italiana che, più di tutte, incarnava lo spirito nazionale essendo «simbolo di concordia e di amor patrio a tutte le genti italiane»⁵²; per diffondere tale lingua la preoccupazione del maestro, ancora una volta, dove essere quella di correggere gli errori di pronuncia che possono poi passare nell'ortografia: i dialetti vengono ancora considerati come fonte di errore e, di conseguenza, come un male da estirpare. All'insegnamento della lingua italiana gioverà molto la dettatura grazie alla sua particolarità di far prestare attenzione ai suoni.

⁴⁸ La convinzione dello stretto collegamento tra lo sviluppo della criminalità e l'educazione del popolo era diffusa negli ambienti più reazionari. Secondo l'allora magistrato Raffaele Garofano, gli insegnanti, stanchi, scontenti dall'impossibilità di raggiungere quegli ideali che avevano sognato nelle scuole normali, si sarebbero vendicati promuovendo il socialismo e allontanando gli alunni dalla religione e dalla morale. Cfr. D. Bertoni Jovine, *La scuola italiana dal 1870 ai giorni nostri*, Roma, Editori Riuniti, 1958.

⁴⁹ R.D. 29 novembre 1894, n. 525.

⁵⁰ Questa formula rivela tutta la preoccupazione politica, più che pedagogica e didattica, dovuta alla mancata formazione di una vera coscienza nazionale, di una educazione civile capace di sviluppare nel popolo quei valori della patria e di unità morale indispensabili per la sopravvivenza dello Stato unitario. Cfr. Ascenzi, *Da plebe a popolo: l'insegnamento della storia nella scuola elementare dalla Legge Casati alla fine del secolo XIX*, in Sani, Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento*, cit., pp. 119-193.

⁵¹ *Riforma dei programmi per le scuole elementari* (1894), cit., p. 222.

⁵² *Ibid.*

Lo scrivere sotto dettatura, quando il maestro adoperi ogni diligenza, specie nel pronunziar bene egli stesso e poi nel correggere le prove degli alunni, renderà facile e pronto il trovare esatta corrispondenza tra i suoni e i segni che li rappresentano⁵³.

E ancora:

Fu altrove accennato quanto conferisca la dettatura a dare abilità e prontezza nell'interpretare il suono della parola e nel trovare i segni per riprodurla in iscritto. Essa è divenuta obbligatoria in tutte le classi e in tutti gli esperimenti di esame. Ma senza la correzione paziente del maestro, lo scrivere sotto dettatura è peggio che inutile. Si raccomanda vivamente che alla pratica del dettare e del correggere sia data quell'importanza che ha ricevuto nei nuovi programmi⁵⁴.

Nonostante le parole che il Ministro Baccelli utilizza in merito alla dettatura siano molto simili a quelle dei Programmi precedenti, il fatto di esplicitare in modo diretto che la dettatura debba considerarsi obbligatoria e presente in tutti gli esami, conferisce un'importanza maggiore a questa pratica, favorendo al contempo anche un suo incremento nella didattica quotidiana. Si può inoltre ipotizzare che queste prescrizioni così chiare siano uno dei motivi che inducono diverse case editrici a pubblicare manualetti, contenenti indicazioni e testi da dettare, a uso degli insegnanti. Sono infatti di pochi anni successivi all'emanazione dei nuovi Programmi il testo di Annetta Rossi Denti⁵⁵ e il nuovo manuale per l'insegnamento della lingua italiana di Andrea Perugini⁵⁶. Il primo suddivide gli esercizi di dettatura in due parti relative, rispettivamente, all'esercizio orale preparatorio e alla dettatura; si raccomanda che «ogni esercizio sia preceduto dalla lettura di un gruppo di sillabe, uguali o consimili a quelle applicate al dettato, e dal richiamo di tutte le regole ortografiche che il dettato richiede»⁵⁷. Per assicurarsi che gli alunni giungano al termine della prima classe sapendo scrivere correttamente, il testo propone un'accurata e graduale suddivisione, mese per mese, di tutti gli esercizi orali e scritti, necessari per il raggiungimento degli obiettivi stabiliti. Si inizia quindi nel mese di novembre con lo scrivere nomi formati da sillabe semplici dirette, dittonghi e tritonghi per concludere a giugno con un ripasso di tutte le regole ortografiche e della punteggiatura svolta durante l'anno. La dettatura viene considerata inoltre come esercizio necessario e di avviamento alla composizione scritta; si legge infatti nel testo che gli esercizi di lingua dovranno cominciare quando gli alunni saranno già

⁵³ *Ibid.*, p. 225.

⁵⁴ *Ibid.*, p. 226.

⁵⁵ A. Rossi Denti, S. Fumagalli Riva, *Esercizi graduati di dettato e di avviamento alla composizione*, Cremona, Tipografia Frisi, 1899.

⁵⁶ A. Perugini, *Nuovo manuale per l'insegnamento pratico della lingua italiana nelle Scuole Elementari. Serie graduata di esercizi di conversazione, di composizione, di dettato. Corso Inferiore, Parte I, Classe I*, Milano, Vallardi, 1898.

⁵⁷ Rossi Denti, Fumagalli Riva, *Esercizi graduati di dettato e di avviamento alla composizione*, cit.

sicuri nel dettato. Al dettato tradizionale si aggiunge anche il dettato muto⁵⁸ che deve essere fatto sui nomi, principalmente di oggetti realmente mostrati agli alunni o di cui è presente un disegno sul cartellone e la cui ortografia non si allontani dalle regole che gli alunni conoscono.

Grazie a queste indicazioni possono essere ravvisati diversi elementi di continuità con la pratica attuale del dettato sia per quanto riguarda la consuetudine odierna di molte insegnanti di dettare solo quelle parole che contengono le sillabe o le difficoltà ortografiche spiegate fino a quel momento, sia per quanto concerne il considerare il dettato come esercizio preparatorio alla composizione testuale; ancora oggi prevale la convinzione che il bambino possa iniziare a scrivere testi nel momento in cui il rapporto tra fonema e grafema, acquisito grazie al dettato, sia ben consolidato. L'idea che il bambino «impari a scrivere scrivendo» e proprio attraverso la scrittura apprenda il rapporto tra fonema e grafema fatica ancora a trovare un'applicazione nella didattica quotidiana.

Tutt'altro che vetuste appaiono le indicazioni presenti nel già citato *Nuovo manuale per l'insegnamento pratico della lingua italiana* di Perugini il quale fornisce preziosi suggerimenti e attenzioni che gli insegnanti devono avere per rendere significativa la pratica del dettato: il rispetto di tali indicazioni permetterà agli studenti di giungere preparati per svolgere l'esame finale al termine di ciascun anno scolastico. Il dettato, come previsto dai Programmi del Ministro Baccelli, diventa una prova d'esame per tutte le classi: in classe prima, per esempio, l'alunno dovrà dimostrare di saper scrivere «facili proposizioni sotto dettatura» che, in classe seconda, vengono sostituite da «brevi periodi sotto dettatura»⁵⁹; per le classi terza e quarta sono invece previsti saggi di dettatura.

Più importante per il discorso che qui stiamo affrontando è il testo che accompagna i diversi esercizi di dettatura; si sottolinea che le parole e le proposizioni, che saranno oggetto di dettatura, debbano essere conosciute dai bambini chiamati a coglierne il senso letterale; la mancanza di comprensione dei termini da parte degli alunni può causare alterazioni e mutilazioni di vocaboli che, a prima vista, possono far «presagire l'assoluta deficienza di senso comune nel bambino o, quanto meno, supporre un difetto nel suo organo uditivo»⁶⁰ ma che, di fatto, sono errori dovuti al metodo utilizzato dall'insegnante. Frasi come «la briglia regge il cavallo e la prudenza degli uomini» o, ancor più misteriose,

⁵⁸ Per la prima volta appare il termine “dettato muto” che troverà largo impiego nella seconda metà del Novecento. Questa pratica, che può essere svolta con varie tecniche (scrivendo alla lavagna e poi cancellando le parole; facendo vedere degli oggetti di cui i bambini devono scrivere i nomi; utilizzando dei disegni ecc...) non fa leva sul processo di decodifica di una parola ma sulla sua memorizzazione.

⁵⁹ Perugini, *Nuovo manuale per l'insegnamento pratico della lingua italiana nelle Scuole Elementari. Serie graduata di esercizi di conversazione, di composizione, di dettato. Corso Inferiore, Parte I, Classe I*, pp. XXXI, XLIII, XLIII, cit.

⁶⁰ *Ibid.*, p. XIX.

quali «la cara innocenza è simile a un gentil fiore che fa pompa dei colori più vivi...ma lieve venticello può abbatterlo»⁶¹ sono astrazioni che la mente del fanciullo non è capace di cogliere e che, certamente, non attireranno il suo interesse. Perugini raccomanda quindi che l'argomento del dettato sia tale da suscitare la riflessione negli alunni e arricchire il loro patrimonio lessicale. Prima di iniziare il dettato è bene che l'insegnante sviluppi l'osservazione e l'attenzione dei bambini attraverso la presentazione di oggetti che possano dare vita a una conversazione; solo allora il contenuto del dettato comprenderà argomenti noti al fanciullo e facilmente comprensibili.

Non diversi da quelli attuali sono anche gli errori che Perugini individua come più frequenti nei dettati dei bambini:

1. confondere nella pronuncia le consonanti doppie colle semplici come il dire: acanito, quello
2. scambiare le lettere di suono affine quali il b con il p; il d con il t; l'f col v; il c con il g molli e c e g duri, la s con la z e via dicendo
3. proferire malamente le parole accentate. Siffatti errori di pronuncia si tramutano in altrettanti di ortografia, aggiungendosi ad altri d'indole prettamente ortografica come quelli dell'omissione o della errata applicazione dell'apostrofo che appaiono nei seguenti esempi: loro per l'oro, lanno per l'anno⁶².

Per far fronte a questi errori è necessario che l'insegnante dedichi tempo al richiamo fonetico, indispensabile a causa della pronuncia alquanto difettosa di molti scolari; anche in Perugini vi è la convinzione che la scorretta pronuncia delle parole sia la causa principale degli errori di ortografia. L'insegnante, dunque, prima del dettato, dovrà chiamare alla lavagna quei bambini la cui pronuncia risulta difettosa ed esercitarli nella lettura chiara del richiamo fonetico; inoltre, prima di dettare sarà compito del maestro leggere chiaramente l'argomento così che gli alunni, oltre a comprenderne il senso, possano rendersi conto degli esercizi fonici e ortografici che dovranno eseguire.

A queste indicazioni così precise e puntuali non può certamente mancare la parte relativa alla correzione che viene riconosciuta anche dai Programmi come momento fondamentale per un apprendimento significativo; i suggerimenti che vengono dati agli insegnanti non sono tuttavia così distanti da certe modalità di correzione che caratterizzano la didattica odierna.

È conveniente segnare in margine, di fianco alla riga che contiene gli errori, uno o più tratti di matita a colori, quanti gli sbagli trovati. Giova pure segnare la classificazione perché il bambino si confronti, di volta in volta, nel vedere i suoi progressi. Negli ultimi mesi di scuola, inoltre, il maestro dovrà restituire ai bambini il quadernetto dei dettati e, chiamando di volta in volta tutti gli alunni, si farà dettare alla lavagna le proposizioni fatte durante

⁶¹ *Ibid.*, p. XIX.

⁶² *Ibid.*, p. XXI.

l'anno; in questo modo verranno ricordati gli errori commessi e sarà compito dei fanciulli aiutare il maestro a correggerli⁶³.

Con il trascorrere degli anni l'attenzione e il riconoscimento del dettato quale strumento indispensabile per l'insegnamento dell'ortografia aumenta in modo considerevole grazie anche alle corpose *Istruzioni*, scritte da Francesco Orestano, annesse ai Programmi del 1905⁶⁴; emanati a seguito dell'entrata in vigore della Legge Orlando del 1904, che prevedeva l'innalzamento dell'obbligo scolastico a 12 anni e la creazione della quinta e sesta classe per gli alunni che non avrebbero proseguito gli studi, i nuovi Programmi nascevano con l'intento di valorizzare l'istruzione anche tra le masse popolari. L'ampiezza del corpus programmatico e la farraginosità delle *Istruzioni* non ottennero un consenso unanime tanto che alcuni critici affermano che «pare di leggere uno dei tanti trattatelli di Pedagogia manipolati da un dottorino che però non ha mai messo piede in una scuola elementare»⁶⁵.

Rimandando ad altra sede il dibattito che ne scaturì⁶⁶, è opportuno soffermarci su alcuni elementi di novità relativi all'insegnamento linguistico ravvisabili nel riconoscimento, almeno nel testo programmatico, di un diverso livello di alfabetizzazione con cui i bambini giungevano a scuola; accanto agli analfabeti, si afferma nel testo, sono infatti presenti anche alunni completamente ignoranti nella lettura o, al contrario, fanciulli che avranno appreso i primi rudimenti in famiglia. Si raccomanda quindi di non usare un metodo uniforme per tutti, ma di distribuire l'insegnamento per gruppi secondo i gradi di capacità. Si invitano inoltre i maestri, soprattutto per alimentare il piacere della lettura, a creare delle bibliotechine di classe i cui libri possono essere quelli dei ragazzi di famiglie agiate lasciati in dono per i nuovi alunni che inizieranno il percorso di studi. Una novità importante nell'insegnamento della lettura consiste nell'abbandono del metodo alfabetico a favore di quello sillabico⁶⁷; la sostituzione dell'abecedario con il sillabario sancisce definitivamente la rinuncia al metodo alfabetico⁶⁸.

⁶³ *Ibid.*, p. XXX.

⁶⁴ R.D. 29 gennaio 1905, n. 45.

⁶⁵ *Impressioni sui programmi*, «La Staffetta Scolastica», 22, 1° aprile 1905, p. 173.

⁶⁶ A questo proposito si vedano i dibattiti sulle riviste scolastiche. Cfr. *Ancora sui programmi*, «La Tribuna Scolastica», vol. I, n. 23, 25 marzo 1905, pp. 225-226; *Nuovi programmi per le scuole elementari*, «La Staffetta Scolastica», vol. V, n. 19, 11 marzo 1905, p. 152; *Impressioni sui programmi*, «La Staffetta Scolastica», cit.; *I nuovi programmi*, «L'unione», vol. XXXVI, n. 22, 9 marzo 1905, p. 169.

⁶⁷ Il metodo alfabetico, già presente nel mondo antico, in Grecia come a Roma, si basa sull'apprendimento, in ordine alfabetico, delle lettere secondo il loro nome (a, bi, ci...enne...) e non secondo il loro valore fonico. Il metodo sillabico si basa sull'apprendimento delle sillabe associando la forma grafica al suono (ba, ta, re...). Cfr. C. Coruzzi, *Scrivere e leggere. Dall'analisi dei metodi a un approccio costruttivista e interazionista*, Firenze, Arnoldo Mondadori, 2002.

⁶⁸ Per un'accurata trattazione sulla pubblicazione e diffusione degli abbecedari, sillabari e dei primi libri di lettura nel periodo post-unitario si veda Barausse, *Learning to read and write in Italy in the second half of the nineteenth century. Primers and reading exercise booklets: publication*,

Se questa novità viene stabilita per l'insegnamento della lettura, per quanto riguarda la scrittura si raccomanda di iniziare dai primi segni elementari e con la grafia delle vocali per giungere, al termine della prima classe, alla scrittura di brevi e facili periodi. Grande importanza viene data al dettato che può iniziare subito per insegnare anche la grafia delle lettere: «scrivi un'astina verticale (mostriamo una cannuccia, un lapis in senso verticale), ora un'astina orizzontale, un puntino, *i*, ancora un'astina verticale ecc...»⁶⁹.

Le *Istruzioni* dedicano ampio spazio alla pratica della dettatura che viene definita

[...] esercizio collettivo per eccellenza, e diverrà sempre di più un potente ausilio dell'insegnamento linguistico, come dimostra il programma delle due ultime classi. Come si è fatto per la lettura, così anche per la scrittura si raccomanda che l'alunno non sia mai portato a scrivere parole, proposizioni o frasi che già non intenda. Non pochi errori di scrittura dipendono dal fatto che il fanciullo non comprende ciò che scrive, come accade anche agli adulti se scrivono sotto dettatura parole ignote. È poi assolutamente indispensabile che all'esercizio segua la scrupolosa correzione degli errori per ciascun alunno⁷⁰.

Il dettato quindi non solo è inteso come strumento per insegnare a scrivere ma come ausilio “potente” per l'insegnamento linguistico; per comprendere che cosa le *Istruzioni* intendano relativamente alla “potenza” del dettato nell'apprendimento della lingua, è però necessario leggere fino in fondo il testo.

Il dettato continua in tutte le classi, nelle prime principalmente, come esercizio di scrittura, nelle altre come integrazione del libro di testo. In ogni caso deve essere preceduto dalla spiegazione del brano che gli alunni debbono scrivere, e delle parole e frasi nuove, che in quello si riscontrino. È da riprovarsi l'uso invalso e seguito ancora in molte scuole, di dettare prima, poi spiegare e infine correggere; oppure di far seguire alla dettatura la correzione ortografica, e poi la spiegazione; peggio ancora di dettare, non spiegare, e, peggio, infine di non correggere. Invece la norma da seguire perché l'esercizio di dettatura sia veramente utile, è questa: prima spiegare, poi dettare, infine correggere⁷¹.

E ancora:

Progredendo nelle classi, il dettato sarà reso più difficile richiedendo dall'alunno la punteggiatura. Questa può cominciare a farsi nella terza classe, dove l'alunno s'inizia alla conoscenza pratica delle varie parti del discorso. Ma l'ufficio del dettato si estenderà ancor di più, quando il maestro se ne servirà per completare tutte quelle nozioni che il libro di testo non può dare. [...] Il dettato servirà dunque ad integrare opportunamente le nozioni di storia locale, di cose, animali e piante del luogo, le quali difficilmente potranno trovarsi nei libri di lettura. Ma servirà ad arricchire il patrimonio di cognizioni letterarie, comprendendo prose

ministerial control and teaching (1861-1898), cit., pp. 109-149.

⁶⁹ «I diritti della scuola», vol. VII, n. 4, 5 novembre, 1905, p. 87.

⁷⁰ *Istruzioni intorno ai programmi delle scuole elementari (1905)*, cit., p. 278.

⁷¹ *Ibid.*, p. 279.

e poesie facili e brevi, che il maestro sceglierà secondo il proprio criterio. Quest'ufficio del dettato diventa preponderante nella quinta e nella sesta classe. [...] Scelga adunque il maestro e detti quei brani e quei componimenti prosastici e poetici, che riterrà pienamente adattati alla intelligenza del ragazzo e meglio efficaci all'educazione del sentimento e del gusto⁷².

La lunghezza della parte concernente il dettato, in sintonia con la corposità del testo delle *Istruzioni*, rappresenta un'eccezione nella storia dei Programmi per la Scuola Elementare: non saranno più ravvisabili, nei futuri Programmi per questo ordine di scuola, indicazioni così lunghe e dettagliate riferite a tale pratica. Nell'ampio spazio dedicato vengono presi in considerazione sia aspetti del dettato già incontrati precedentemente, sia nuove funzioni ad esso affidate che caratterizzeranno soprattutto l'uso del dettato nell'era fascista; aspetti questi che non sfuggono all'attenzione dell'editoria scolastica che, in continua espansione in quest'epoca, attraverso guide, manuali e libri di testo, accompagna l'azione degli insegnanti orientandone le scelte didattiche, e non solo.

In primo luogo, il dibattito si concentra sul rapporto tra il dettato e l'apprendimento dell'ortografia: se chi, come Sclaverano individua nel dettato, insieme al copiato e all'ortoepia, la chiave essenziale per l'apprendimento dell'ortografia, Benferroni si mostra più scettico sottolineando la mancanza di un rapporto così diretto, quasi di causa ed effetto, tra lo scrivere sotto dettatura e lo scrivere in maniera ortograficamente corretta. La posizione di Sclaverano risulta piuttosto categorica: «Per insegnare bene l'ortografia nelle scuole elementari, quali dettati dobbiamo preferire? I dettati che hanno lo scopo diretto di far conoscere agli alunni la struttura o, se vogliamo, la tecnica della nostra lingua: l'ortografia in altre parole»⁷³. L'ortografia si apprende quindi attraverso una moltitudine di esercizi sulle difficoltà che gli alunni incontrano mentre scrivono e che devono essere presentate in modo sistematico. L'insegnante dovrà quindi procedere scrivendo alla lavagna le difficoltà che intende affrontare, facendole leggere e analizzare dagli alunni stessi per poi proseguire con la dettatura vera e propria; quest'ultima deve avvenire secondo una progressione determinata: dalle parole isolate (schiettezza, spranga ecc...) si passerà a quelle accoppiate (ragazzo schietto), per procedere poi con la dettatura di proposizioni che però non devono contenere altre difficoltà ortografiche oltre a quelle per cui si sta facendo l'esercizio; la stessa attenzione deve essere mantenuta anche per la dettatura di brevi periodi. In questo modo, secondo l'autore si pongono le basi per l'apprendimento dell'ortografia.

Più diffidente si mostra invece Benferroni il quale critica proprio la tendenza dei Programmi Ministeriali, e in particolar modo quelli del 1905, a porre un accento così marcato sul dettato quale strumento per l'apprendimento

⁷² *Ibid.*, p. 280.

⁷³ G. Sclaverano, *L'ortografia e il comporre nelle scuole elementari*, Paravia, Torino, 1912, p. 11.

dell'ortografia; così facendo «gli insegnanti fecero e fanno dettati sopra dettati (spesso disdicevoli e disadatti) e credono di aver insegnato. E questo non è»⁷⁴. Il rapporto tra dettato e ortografia, secondo l'autore, è vero solo in parte poiché il dettato non deve essere considerato il punto di partenza per l'apprendimento dell'ortografia ma il punto di arrivo in quanto esercizio di applicazione attorno a una o più difficoltà ortografiche. Non è quindi attraverso il dettato che il bambino impara a superare una difficoltà ortografica ma con l'insegnamento che deve precedere il dettato stesso; secondo Benferroni sono le lezioni, ben ordinate e collegate, dedotte dalla lingua scritta che, se fatte con cura e sistematicamente, contribuiranno all'apprendimento dell'ortografia.

Chi dunque parte da un dettato per insegnare una regola, scambia la stazione di arrivo con quella di partenza⁷⁵.

Questa confusione, messa in luce dall'autore, tra dettato come strumento di insegnamento e come consolidamento di alcune competenze, non deve essere sottovalutata se si pensa che, ancora oggi, sono frequenti dettati in cui non si comprende se lo scopo sia quello di insegnare il rapporto tra fonema e grafema, quello di consolidare tale rapporto o, ancora, di verificarlo⁷⁶.

Anche Sclaverano insiste molto sull'importanza di questa distinzione affermando la necessità di dividere i dettati in due specie: dettati ortografici propriamente detti e dettati di ricapitolazione o riassuntivi; i primi, secondo l'autore servono per far conoscere e superare alcune difficoltà ortografiche mentre i secondi per verificare che gli alunni abbiano compreso le particolarità in oggetto. A seconda della scelta che si faccia, cambia anche la modalità di dettatura; nel caso dei dettati riassuntivi:

Chi detta non deve scostarsi dalla cattedra: il suo sguardo deve essere rivolto a tutti indistintamente gli alunni. È grave errore il passeggiare fra i banchi per vedere che cosa fa l'alunno e che cosa fa l'altro, perché in tal modo si corre il pericolo di deviare l'attenzione degli alunni i quali la debbono rivolgere ad un punto solo: la persona di chi detta [...] Né chi detta deve in nessun modo far comprendere, o dirò meglio far indovinare, come si deve scrivere questa o quella parola, perché allora l'esercizio di dettatura perde ogni valore, inquantochè l'alunno fa per puro meccanismo quello che dovrebbe fare con sicuro intendimento⁷⁷.

Vengono alla mente, grazie a queste parole, molti dettati odierni in cui, proprio a causa della confusione, o della mancata dichiarazione dello scopo per cui si detta, l'insegnante suggerisce chiaramente agli alunni come scrivere

⁷⁴ Benferroni, *Insegnamento dell'ortografia nelle scuole elementari*, cit., p. 18.

⁷⁵ *Ibid.*, p. 32.

⁷⁶ Le interviste raccolte tra gli insegnanti dell'attuale scuola primaria evidenziano chiaramente la difficoltà nel riflettere sullo scopo di tale pratica. Cfr. Farina, *Il dettato nella Scuola Primaria. Analisi di una pratica di insegnamento*, cit.

⁷⁷ Sclaverano, *L'ortografia e il comporre nelle scuole elementari*, cit., p. 17.

una determinata parola, specialmente se presenta delle consonanti geminate o degli accenti e, passeggiando tra i banchi, corregge direttamente gli errori degli alunni. Si è a volte ancora lontani dallo svolgere il dettato, come sottolineava Benferroni, con assoluta naturalezza, senza esagerare la pronuncia come a segnalare qualche particolarità ortografica.

Ancora più critica risulta la posizione dell'autore nei confronti del rapporto tra ortografia e ortoepia su cui anche i Programmi del 1905 ponevano grande attenzione per evitare che una cattiva pronuncia, soprattutto dovuta ai dialetti, diventasse la causa principale degli errori ortografici. Anche in questo caso, spiega l'autore, il rapporto è vero solo in parte poiché l'ortografia ha un altro fondamento oltre a quello dell'ortoepia.

Se il maestro detta: *rosa*, gli scolari scriveranno *rosa* o *Rosa*? E in altri casi, dovranno scrivere *luna* o *l'una*?- *ai compagni* o *hai compagni*?- *po'* o *Po*?⁷⁸

L'ortografia può avere per base l'ortoepia se si tratta di una semplice traduzione di suoni ma, in molti altri casi è necessario ricorrere alla logica, alla etimologia della parola o alla grammatica. Viene quindi messo in discussione un rapporto che, dai primi Programmi del 1861, era considerato imprescindibile e che, attualmente, rappresenta ancora uno dei motivi per cui gli insegnanti utilizzano la pratica del dettato.

Ma la vera novità dei Programmi del 1905 in merito al dettato è il riferimento diretto a questa pratica come integrazione del libro di testo, a completamento delle nozioni di storia, di animali, di piante, che difficilmente potranno trovarsi sul libro di lettura. Il dettato dovrà servire inoltre all'arricchimento del patrimonio letterario dell'alunno attraverso la dettatura di prose o poesie di autori illustri e che educino al sentimento e al gusto⁷⁹. Si comprende come il dettato diventi in questo modo funzionale al raggiungimento di altri fini tra cui quello di inculcare nelle giovani menti determinati valori; fine che sarà prioritario nell'epoca fascista.

Per questo motivo entrambi gli autori presi in considerazione in quest'ultima riflessione, assumono una posizione molto critica nei confronti di questo uso strumentale del dettato.

⁷⁸ *Ibid.*, p. 9.

⁷⁹ Il dettato utilizzato per l'arricchimento del patrimonio letterario dell'alunno non è solo una pratica tipicamente italiana. Nell'interessante ricerca di Anne-Marie Chartier, sui quaderni degli alunni a partire dal 1880, è possibile trovare molte analogie con il dettato italiano. La letteratura sembra infatti essersi "intrufolata" nella scuola grazie ai dettati di prosa che diventavano indelebili nella memoria degli alunni. Come descritto nei Programmi del 1905, anche in Francia, prima del 1918, i dettati costituivano delle vere e proprie lezioni: *La bugia*, *L'amore per la patria* oppure diventavano lezioni di scienze, geografia e storia. Cfr. A.M. Chartier, *La dictée dans les cahiers d'élèves (1880-1980): un exercice au long cours*, «Repères. Recherches en didactique du français langue maternelle», n. 56, 2017, pp. 17-32.

Ma questo dettato non ha nulla a che fare con l'insegnamento dell'ortografia: suppone anzi già l'abilità di scrivere ortograficamente. Qui, mi sia permesso il dirlo, s'è perduto di vista lo scopo vero del dettato e il nesso ch'egli ha con le altre parti dell'insegnamento del linguaggio. Così nacquero i dettati ideologici, vero tempo perso nelle scuole, se almeno c'è un discreto libro di lettura. [...] Il dettato deve essere ortografico, questa è la regola⁸⁰.

È possibile quindi affermare che con i Programmi del 1905 si sancisce, in modo più sistematico che in passato, la nascita del dettato ideologico che avrà ampia diffusione nelle nostre scuole. Sfogliando le riviste scolastiche di quell'epoca si trovano, a partire dalla classe seconda, dettati ideologici volti alla trasmissione di regole di igiene, di amore per i più poveri, di aiuto ai genitori. Sul n. 4 della rivista *I diritti della scuola*, nel mese di Novembre del 1905, sono presenti diversi dettati ideologici:

Ogni mattina io mi lavo con acqua fredda. Sono amica del sapone, del pettine, di tutto quello che serve a diventare puliti. Anche i miei abitini non portano macchie perché ne ho molta cura⁸¹.

Valori di tutt'altro genere vengono trasmessi con il seguente dettato:

Con un soldo posso comprare le castagne. Ma il soldo si può spendere meglio. Il cartolaio mi può dare in cambio una penna, oppure una matita, od i pennini. Se poi regalo un soldo a un poverino, faccio una buona azione⁸².

Si può facilmente intuire come lo scopo di questi dettati non sia certo quello di insegnare l'ortografia anche se, ovviamente, venivano corretti gli errori e il voto era assegnato in base alla correttezza o meno dello scritto⁸³.

Anche Sclaverano avverte la pericolosità di questi dettati, non tanto per i contenuti trasmessi, quanto per il loro allontanarsi dall'obiettivo primario dell'insegnamento ortografico. L'inconveniente, egli scrive, consiste appunto nel pensare di poter sostituire i dettati ortografici con un altro tipo di dettati che non necessariamente contengono, nel giusto ordine e nella corretta misura, le difficoltà ortografiche precedentemente spiegate. Secondo l'autore il rischio più grosso dei dettati ideologici consisterebbe nel porre gli alunni di fronte a

⁸⁰ Benferroni, *Insegnamento dell'ortografia nelle scuole elementari*, cit., pp. 18-19.

⁸¹ «*I diritti della scuola*», vol. VII, n. 4, 5 novembre, 1905, p. 87. Questo richiamo all'igiene è da connettersi con l'ampia attenzione che questi Programmi dedicano alla pulizia personale a cui le giovani generazioni devono essere educate al fine di combattere la difficile situazione sanitaria presente nella società dell'epoca.

⁸² *Ibid.*, p. 87.

⁸³ Vi è una chiara analogia tra i contenuti di questi dettati e le letture presenti nei sillabari e nei libri di lettura ampiamente diffusi in tutte le scuole per avviare, come sostiene Barausse, l'interiorizzazione dei valori quali l'onestà, l'integrità, il senso dell'onore, il rispetto della legge, propri dell'etica borghese, costituiscono i *topoi* dei libri per l'avviamento alla lettura di quest'epoca. Cfr. Barausse, *Learning to read and write in Italy in the second half of the nineteenth century. Primers and reading exercise booklets: publication, ministerial control and teaching (1861-1898)*, cit.

particolarità ortografiche di cui non sono ancora a conoscenza e che sarebbero la causa della gran confusione che a volte gli alunni fanno nella scrittura delle parole.

Persuadiamoci dunque che l'ortografia non si può insegnare che «metodicamente» e che i dettati ortografici ne sono il mezzo più sicuro ed efficace⁸⁴.

Riflessioni conclusive

Con tale “sentenza” si conclude questo excursus storico sulla pratica del dettato che, almeno per i primi cinquant'anni post-unitari, è stato uno strumento al quale tutti gli insegnanti hanno fatto ricorso per l'insegnamento della lingua italiana e dell'ortografia a una popolazione per lo più dialettofona. Non è facile individuare le ragioni di tanto successo, tuttavia possono essere avanzate alcune ipotesi.

In primo luogo, il dettato è un esercizio che non implica una grande preparazione da parte degli insegnanti e, se si considera il livello culturale dei maestri che venivano scelti per questo compito, si può facilmente intuire come fosse indispensabile dotarli di strumenti semplici che potessero essere padroneggiati anche con una conoscenza rudimentale della lingua italiana. Questa considerazione circa la facilità del dettato come strumento di cui gli insegnanti non preparati si possono servire, è confermata anche ai giorni nostri da alcuni studiosi; Davis e Rinvolucris⁸⁵ – nel loro testo interamente dedicato al dettato per l'insegnamento dell'inglese come lingua straniera – riconoscono a tale pratica il vantaggio di essere una sicurezza per quegli insegnanti non madre lingua che possono studiare a casa la pronuncia per poi procedere con la dettatura in classe. Se si considera che molti insegnanti, ancora agli inizi del XX secolo, parlavano in dialetto e che tutte le *Istruzioni* ai testi programmatici ribadivano l'importanza della retta pronuncia, si può intuire come il dettato potesse ottenere il favore dei maestri che potevano prepararsi anticipatamente.

In secondo luogo, la formazione degli insegnanti avveniva, prima dell'Unità d'Italia, nelle Scuole di Metodo e, successivamente, nelle Scuole Normali che ereditarono dalle precedenti alcuni aspetti, tra cui, come dice il nome stesso, l'attenzione al metodo. A causa dell'ignoranza degli insegnanti, l'enfasi di queste scuole era posta sul metodo, capace di dare sicurezza a fronte di una carenza culturale. Si andò così molto spesso incontro a una “meccanicizzazione” del maestro che, come un ingranaggio, doveva funzionare sempre allo stesso modo

⁸⁴ Sclaverano, *L'ortografia e il comporre nelle scuole elementari*, cit., pp. 12-13.

⁸⁵ P. Davis, M. Rinvolucris, *Dictation. New methods, new possibilities*, Cambridge, Cambridge University Press, 1988.

per evitare di incappare in questioni che, vista la sua impreparazione, non sarebbe stato in grado di affrontare. In un'attenzione così ossessiva al metodo, il dettato possiede proprio quelle caratteristiche di regolarità, progressione, controllabilità che potevano infondere sicurezza nei maestri⁸⁶.

Non da ultimo, almeno nei primi quindici anni dopo l'unificazione, nonostante lo sforzo dello stato di imporre l'uso generalizzato del testo scolastico nelle classi, la tendenza maggiore era quella di utilizzare testi non scolastici o, come ribadito anche dai Programmi del 1905, di dettare le lezioni.

Forse, proprio la fortuna che il dettato ha avuto nei primi cinquant'anni post-unitari, quando sono state fondate le radici della futura scuola italiana, rappresenta uno dei motivi della sua "ritualizzazione" o, più semplicemente, del suo confermarsi come pratica routinaria nelle odierne scuole primarie⁸⁷.

⁸⁶ Cfr A. Santoni Rugiu, *Maestre e maestri. La difficile storia degli insegnanti elementari*, Roma, Carocci, 2006.

⁸⁷ Nonostante accorati appelli per la sua restaurazione, il dettato è già fortemente presente nelle scuole italiane, soprattutto nei primi anni della scuola primaria. Seppur non ci sia un dato prettamente quantitativo capace di confermarlo, ricerche sul campo precedentemente citate, testimonianze di colleghi che operano nelle diverse Università italiane, analisi di protocolli osservativi che provengono dagli studenti di Scienze della Formazione Primaria, nonché l'ampia presenza dello stesso sulle principali riviste scolastiche rivolte alle insegnanti, testimoniano quanto questa pratica sia ancora radicata nella scuola primaria italiana.

Educating teaching staff in a teacher training school in Nazareth (1944-1948)

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ABSTRACT: During World War II, outside the borders of Poland, nursery schools, primary, secondary and vocational schools were established where refugees' children attended. Those refugees were people deported from Poland to the Soviet Union. In order to provide primary schools with teachers, a teacher training secondary school for girls was established in Nazareth in Palestine, as a part of the Polish Army in the USSR. The school achieved a high level of teaching in the difficult conditions of the refugee life. It gave education to over a hundred devoted teachers who really wanted to work with children.

EET/TEE KEYWORDS: Teacher training school; Schoolgirls; Teachers; Education; Teaching practice; Poland; XXth Century.

Introduction

Educating teachers in order to rebuild the Polish education system after the war was an important task for the government in exile during the World War II. The Polish authorities abroad, who had to cope with numerous difficulties, managed to create an education system consisting of kindergartens, primary schools, secondary, vocational, and continuation schools (including military ones) functioning in several regions of the world and educating ca. 18 thousand students. They mainly came from Polish families deported from the eastern areas of the Republic of Poland into the middle of the Union of Soviet Socialist Republics within the years 1939-1941¹. The deported people were located in

¹ A. Głowacki, *Deportacje dzieci i młodzieży w głąb Związku Sowieckiego w latach 1940-1941* [Deportations of Children and Youth into the USSR in 1940-1941], in J. Wróbel, J. Żelazko (edd.), *Polskie dzieci na tułacznych szlakach 1939-1950* [Polish Children in Exile Pathways], Warsaw, Institute of National Remembrance, Commission for the Prosecution of Crimes against the Polish Nation, 2008, pp. 25-41.

labour camps and kolkhozes, especially in Siberia, Kazakhstan, Uzbekistan and other remote parts of the USSR. They suffered poverty, hunger, diseases, and sometimes they were even killed. On 30th July 1941 in London, the prime minister of the Polish government, Władysław Sikorski, signed a treaty with Ivan Maisky, the Russian ambassador in Great Britain. The treaty concerned the restoration of the diplomatic relations between Poland and Russia, which made it possible to create the Polish Army in the USSR commanded by general Władysław Anders. The deported civilians, including children and youth, started to gather around the Polish troops that were being formed. In order to protect and educate those young people, on 12th September 1941, general Władysław Anders issued the command to create Junak (youth) troops and a Junak School by the Reserve Centre of the Polish Army in the USSR in Totskoye². While organizing this military formation, the command referred to the idea of the youth work service specified in the decree of the Polish President of 22nd September 1936. Before the war, the paramilitary Junak troops successfully worked for the good of the country³.

This was the beginning of the creation of military schools. At the same time, it facilitated the development of Polish civil schools in exile. Other military educational institutions were separated from the Junak School. Within the Women's Auxiliary Service (whose members were called volunteers), created as a part of the Polish Army in the USSR, in March 1942 a Junak school for girls was created to educate girls on the primary school and junior high school level. On 24th May 1942, Teodora Zofia Sychowska was elected as the first commandant of the school. She was a graduate of the Poznań University, and a good organizer liked by young people and teachers⁴.

In 1942, all the military educational institutions were evacuated with the Polish Army in the USSR, first to Iran, and then to Palestine and Egypt. The Junak School Command was appointed as a part of the Polish Army in the East commanded by lieutenant-colonel Ignacy Bobrowski. His successor was lieutenant-colonel Kazimierz Rzyziński. During the World War II, nineteen Junak schools were functioning in Palestine and Egypt. One of them was the School for Younger Volunteers (Polish abbreviation: SMO) created from a Junak school for girls on the basis of the command issued by the Polish Army in the East on 5th December 1942. The School for Younger Volunteers was located

² A. Kołodziej, *Szkoły junaków w Armii Polskiej na Wschodzie* [Junak Schools in the Polish Army in the East], «Wojskowy Przegląd Historyczny [Military Historical Review]», vol. 1, 1996, p. 226; Tadeusz Bugaj, *Obozy i szkoły junackie dla młodzieży polskiej na obczyźnie* [Junak Camps and Schools for the Polish Youth Abroad], «Prace Karkonoskiego Towarzystwa Naukowego [Works of the Karkonosze Scientific Society]», vol. 13, 1979, pp. 60-63.

³ «Journal of Laws of the Republic of Poland», n. 72, 1936, item 515.

⁴ H. Bauer, Z. Kosińska, D. Kossakowska (edd.), *Książka pamiątkowa Szkół Młodszych Ochotniczek* [Commemoration Book of the Schools for Younger Volunteers], London, published by the Association of the Schools for Younger Volunteers, 1976, pp. 19-20.

in such places as, respectively: Gedera, Rehovot, Quastina, Jenin, and, since the end of 1943, Nazareth. SMO included the Primary School, the Trading-State Course transformed into the Trading Junior High School and later – into the Administration and Trading Secondary School, as well as the Comprehensive Junior High School and the Humanist Secondary School. All those schools lacked qualified teachers⁵. In Palestine, in Ein-Karen, there was a civilian six-grade primary school, a comprehensive junior high school, and a few secondary school classes cooperating with a military school for girls⁶.

In order to function properly, the developing school system needed qualified teachers, especially on the level of primary and vocational schools. In exile, it was very difficult to solve this problem. Some of Polish refugees were teachers, but their number was too low to ensure proper functioning of the education system⁷.

The problem was getting even more difficult as Polish schools in exile started to develop in the years 1942-1945. It was noticeable in the Polish schools subject to the Representations of the Ministry of Religious Denominations and Public Enlightenment (Polish abbreviation: MWRiOP) run by the government of the Republic of Poland in London and located in Iran (Teheran), Palestine (Jerusalem), India (Bombay)⁸, Mexico (Santa Rosa)⁹, New Zealand (Pahiatua)¹⁰, and in Africa (Nairobi in Nicaragua)¹¹. The lack of teachers was particularly painful in the area of the activity of MWRiOP representations in Teheran and Jerusalem. In 1943-1944, in each of those schools, 2-4 thousand young people

⁵ J. Draus, *Oświata i nauka polska na Bliskim i Środkowym Wschodzie 1939-1950* [Polish Education and Science in the Middle East], Lublin, Scientific Society of the Catholic University of Lublin, 1993, pp. 161-171; J. Pietrzak, *Polscy uchodźcy na Bliskim Wschodzie w latach drugiej wojny światowej. Ośrodki, instytucje organizacje* [Polish Refugees in the Middle East during the World War II. Centres, Institutions, Organizations], Łódź, Łódź University Press, 2012, pp. 228-234.

⁶ Z. Alexander, D. Buras D. Chmielewska i in. (edd.), *Ain - Karen ośrodek polskich dziewcząt* [Ein-Karen, the School for Polish Girls], London, Ein - Karen Association 1988.

⁷ W. Chmielewski, *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948* [Preparation of Educational Staff in Exile in the Years 1941-1948], Series of Monographs on the History of Education, Warsaw, Institute of the History of Science of Louis and Alexander Birkenmajer, Polish Academy of Sciences, ASPRA – JR Publishing House, 2013, Vol. XLIII, p. 24.

⁸ Chmielewski, *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948*, cit., pp. 120-122.

⁹ Id., *Polskie osiedle Santa Rosa w Meksyku 1943-1946* [Polish Settlement of Santa Rosa in Mexico within 1943-1946], Warsaw, Institute of the History of Science of Ludwik and Aleksander Birkenmajer of the Polish Academy of Sciences, Jan Kochanowski University in Kielce, ASPRA-JR Publishing House, 2015, pp. 99, 115-116.

¹⁰ Qualification sheets of teachers employed in the comprehensive junior high school in Pahiatua, New Zealand, Polish Institute and Sikorski Museum, London (PISML), Archives Ref. No: A.19.III.17.

¹¹ Chmielewski, *Szkolnictwo polskie w Afryce Środkowo - Wschodniej i Południowej podczas II wojny światowej* [Polish Education in Central-East and South Africa During the World War II], «Przegląd Historyczno – Oświatowy [The Journal of History and Education]», vols. 3-4, 2008, pp. 61-74.

were studying. The numbers were changing along with the relocations of the schools to Africa, India and other places¹².

In the postwar Poland, too, the insufficient number of teachers was a problem since the second half of 1944. The provision of qualified teachers was of strategic importance for the education system that was being rebuilt after the destruction of the war. Already during the war, the Polish educational environment in Great Britain was aware of the fact that educational institutions would face such a difficult situation in future¹³.

Therefore, a representative of MWRiOP in Jerusalem, Józef Follprecht, came up with the idea of educating teachers in exile. In 1943, he started to aim at creating a teacher training school in Palestine. The idea was also close to Teodora Sychowska who prepared a request for the creation of a Teacher Training Secondary School for Younger Volunteers in Nazareth¹⁴. She received a positive decision of educational authorities concerning this request on 12th February 1944¹⁵.

Jan Draus¹⁶, a scholar dealing with Polish education in exile during the Second World War, wrote two brief texts on the creation and activity of the Teacher Training Secondary School in Nazareth. More details concerning the Secondary School were included in my two publications. However, because of the lack of source materials, I only described the first year of the school's functioning, and I highlighted, from the theoretical perspective, the organization of pedagogical apprenticeship fulfilled by the candidates for teachers¹⁷. Fruitful results of further queries carried out at the Polish Institute

¹² Draus, *Oświata i nauka polska na Bliskim i Środkowym Wschodzie 1939-1950*, cit., pp. 84-164; Pietrzak, *Polscy uchodźcy na Bliskim Wschodzie w latach drugiej wojny światowej. Ośrodki, instytucje organizacje*, cit., pp. 210-235.

¹³ Chmielewski, *Zrzeszenie Nauczycieli Polaków w Wielkiej Brytanii wobec kraju (1941-1946)* [The Association of Polish Teachers in Great Britain and the Situation in the Country], «Przegląd Historyczno - Oświatowy», vols. 3-4, 2015, pp. 133-137.

¹⁴ E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)* [The General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers within 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

¹⁵ Chmielewski, *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948*, cit., p. 111.

¹⁶ Draus, *Szkoła Młodszych Ochotniczek w Palestynie 1942-1947* [School for Younger Volunteers in Palestine], «Rocznik Komisji Nauk Pedagogicznych [Yearly of the Commission for Pedagogical Sciences]», vol. XLIII, 1989, pp. 172-173; Id., *Oświata i nauka polska na Bliskim i Środkowym Wschodzie 1939-1950*, cit., pp. 168-169.

¹⁷ Chmielewski, *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948*, cit., p. 111; Id., *Z działalności Liceum Pedagogicznego w Nazarecie* [On the Activity of the Teacher Training Secondary School in Nazareth], in *Człowiek idea dzieło. Prace dedykowane Profesor Stefanii Walasek* [Man, Idea, Work. Texts Dedicated to Professor Stefania Walasek], Wrocław, Chromcon Publishing House, 2013, pp. 373-395. Moreover, I published two books concerning the activity of teacher training secondary schools in Poland: *Kształcenie nauczycieli w okresie ideologizacji szkolnictwa (1944-1956)* [Educating Teachers in the Period of the Ideologization

and Sikorski Museum in London and at the department of manuscripts of the National Library in Warsaw helped me to take up this subject anew in order to save the noble history of that unique teacher training institution. Among the archival materials, I found reports from the school's work, some instructions and a detailed chronicle. The main objective of this article is to thoroughly present the achievements of the Polish teacher training school in Nazareth run in difficult conditions in exile, and to show that, despite extremely unfavourable circumstances, due to the commitment of the teachers and the students, as well as their civic and patriotic attitude, it was possible to achieve good results in educating teachers.

The Teacher Training Secondary School was created from a part of the Humanist Secondary School for Younger Volunteers. The founders of the school also organized a new junior high school separated from the existing four-year comprehensive high school. The new high school was to prepare the girls for studying at the secondary school for teachers. The new comprehensive junior high school and the two-year teacher training secondary school included 210 girl students in February 1940. The number of junior high school students was much higher at that time. The commandant and the acting director of the new schools was a graduate of the University of Warsaw and a teacher at one of Polish teacher training seminars – captain Emilia Zdziarska, PhD. She was officially appointed to be the commandant of the schools on 15th March 1944. On 14th June 1944, the Teacher Training Secondary School received the full rights of a public school for the school year 1943/44 on the basis of the regulation of the minister of religious denominations and public enlightenment of 4th August 1943, issued in agreement with the minister of foreign affairs and the minister of labour and social care concerning the creation of the Representations of MWRiOP¹⁸. These rights were updated in the following years¹⁹. The activity of the Secondary School was fulfilled on the basis of the act on the education system of 11th March 1932²⁰. However, the structure of the school was changed as compared with the original provisions of the act: the time of studying was shortened from three to two years. The representative of MWRiOP, Józef Follprecht, justified this decision with the necessity to quickly educate the teachers needed at various schools in exile²¹. Not only did the Polish educational authorities in London believe the decision was right, but – in

of Education], Warszawa, Neriton Publishing House, 2006; Id., *Edukacja nauczycieli szkół powszechnych po II wojnie światowej* [Education of Primary School Teachers after the World War II], Warsaw, Neriton Publishing House, 2007, and several dozen scientific articles.

¹⁸ The letter of the Representative of MWRiOP of 14th June 1944 to the command/director of LP MO in Nazareth. PISML, Archives Ref. No: A. 74/42.

¹⁹ S.M. Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie* [Chronicle of the School for Younger Volunteers Run by the Polish Army in the Middle East], vol. I, 12 February 1944, National Library in Warsaw, Rps. sign. IV 10438/1.

²⁰ «Journal of Laws of the Republic of Poland», n. 38, 1932, item 389. 515.

²¹ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., p. 377.

the guidelines for creating teacher training secondary schools in all large groups of Polish refugees, issued at the end of 1944 – they provided the organization of the two-year Teacher Training Secondary School in Nazareth as a good example to be followed by others²².

The secondary school was organized like a military troop, based on the regulations resulting from the statute of the Junak schools. Each class was a platoon. Four or five platoons constituted a company supervised by a commandant. Each company had a chief, a warrant officer in charge of economic affairs and a warrant officer in charge of the materials. The military organization of the Teacher Training Secondary School was approved by the Polish military authorities. The students of the school included the so-called volunteers from the Women's Army Auxiliary Service and younger volunteers²³.

Material conditions of the school

The material basis of the school was good, but it underwent several changes. The secondary school used the same buildings that belonged to SMO in Nazareth. At first, it was located downtown, near the main building of the school (Terra Santa Monastyr), in a brick house called Casa-Nova. The location of the Secondary School was good, because it was close to all the school's laboratories and the library of the Junak school for girls. Some students of the Secondary School studied in the building located next to Terra Santa Monastyr. However, because of the fact that there were almost 800 of the SMO students, which resulted in crowding the main building, the Teacher Training Secondary School decided to move to another place. From the beginning of the school year 1944/45, the school functioned in the Austrian Hospice located on the outskirts of the town. The new school complex, which consisted of comfortable wooden bungalows, was located in a pine park. It had already been treated as an "exercise school" for future teachers. Soon, however, the military English authorities took over a part of the camp in which the Teacher Training Secondary School was functioning. Due to the attempts of Teodora Sychowska, the school received another building. It offered good conditions for studying. There were electric fans in classrooms and laboratories, as a result of which it was possible to cope with the summer heat. The students could use several girls'

²² Id., *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948*, cit., pp. 115, 121, 126. In exile, on the basis of the Nazareth experience, two-year teacher training secondary schools were created in Valivade (India) and Lubeck (Germany). Two-year teacher training secondary schools were also opened just after the war in Poland, cf. Chmielewski, *Kształcenie nauczycieli w okresie ideologizacji szkolnictwa (1944-1956)*, cit., pp. 43-50.

²³ Bauer, Kosińska, Kossakowska (edd.), *Książka pamiątkowa Szkół Młodszych Ochotniczek*, cit., p. 22.

bedrooms, common rooms and a garden. In the nearby main building of SMO the secondary school students could use libraries and a few laboratories²⁴.

After the Allies, and especially Great Britain, withdrew their support for the Polish government in London on 5th July 1945, the issue of financing the Polish education system in Great Britain and in other countries became much more difficult. On 7th July 1945, the Interim Treasury Committee for Polish Questions started the process of liquidating the Polish education system in Great Britain. The main task of this institution was to liquidate the financial obligations of the Polish government in exile²⁵. Schools were subject to the Committee's Educational Branch managed by professor Tadeusz Sulimirski. On 1st April 1947, the Committee for Education of Poles in Great Britain took over the issues connected with education. The institution functioned until 30th September 1954²⁶.

The International Refugee Organisation and the United Nations Relief and Reconstruction Administration spent a lot of money to maintain the Polish schools in Palestine. In 1946, in Great Britain, the Polish Resettlement Corps was created to help Polish soldiers in Great Britain, in the Middle East and in Italy (2nd Corps) adjust to civilian life²⁷. Due to the attempts of general Władysław Anders, Junak schools were also given the right to come to Great Britain²⁸. Their supervisors were asked to sign a declaration on joining the Polish Resettlement Corps on the basis of which they were allowed to leave Palestine and arrive in Great Britain. This requirement, issued by the English, applied to adults and youth above the age of 17. Those who did not sign the declaration could not go to Great Britain. Signing the declaration did not mean becoming a member of that organization²⁹.

While fulfilling these procedures, general Józef Wiatr from the command of the Polish Army in the East came to SMO in Nazareth on 18th May 1947 and

²⁴ Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)*, cit.

²⁵ S. Szydłowski, *Studia wyższe Polaków w Wielkiej Brytanii 1947-1961* [Higher Education of Poles in Great Britain], «Nauka Polska na Obczyźnie 1939-1960 [Polish Education Abroad 1939-1960]», vol. 3, 1955-1961, p. 37.

²⁶ T. Sulimirski, *Nauka polska na obczyźnie 1939-1954* [Polish Education Abroad 1939-1954], «Nauka Polska na Obczyźnie», vol. 1, 1955, pp. 3-4.

²⁷ J.R. Radomski, *Demobilizacja Polskich Sił Zbrojnych na Zachodzie w latach 1945-1951* [Demobilizing Polish Armed Forces in the West in 1945-1951], Kraków, Księgarnia Akademicka Fundacja Centrum Dokumentacji Czynu Niepodległościowego [Foundation of the Centre for the Documentation of Activities Aiming at Independence], 2009, pp. 85-106.

²⁸ *Sprawa przybycia do W [ielkiej] Brytanii szkół polskich, zorganizowanych i nadzorowanych przez wojsko we Włoszech i na Bl [iskim] Wschodzie* [The Arrival of Polish Schools, Organized and Supervised by the Army in Italy and in the Middle East, to Great Britain], PISML, Archives Ref. No: A.19. III/28.

²⁹ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 19th July 1947.

said that soon all the Junak schools would be evacuated to Great Britain³⁰. Indeed, after the sea voyage which lasted from 24th July to 5th August 1947, the Teacher Training Secondary School was located in Foxley near Hereford, in Great Britain³¹. The camp could accommodate about four thousand people. The living and studying conditions got worse. Forty-two girls from the Secondary School (24 first-year students and 18 second-year students) were accommodated in poorly equipped and insufficiently heated bungalows. The classrooms were also cold and unadjusted to participation in school lessons. Moreover, the students and teachers had to change classrooms and buildings several times. It was tiresome for everyone and it disorganized the work of the school. Also, the students' bedrooms were located far from the army's kitchen. The male teachers were located in another camp, which also hindered the stability of the school's functioning³².

Teaching staff

The Teacher Training Secondary School had a good teaching staff consisting of full-time and part-time teachers. All of them were very committed to their didactic and upbringing work. Their effort deserves recognition and commemoration. The full-time teachers were qualified and experienced. Most of them graduated from universities. In the second half of the school year 1943/44, five full-time teachers were employed at the school: Emilia Zdziarska, psychology (PhD in philosophy, a certified secondary school teacher), Zofia Kiper, history, (MA in philosophy, a certified secondary school teacher), Szczesna Kluk, physical exercises (the Central Institute of Physical Education in Warsaw), lieutenant Józef Moraczewski, Polish language and literature (MA in philosophy, a certified secondary school teacher), Stanisław Sztaba, the propaedeutics of philosophy, the history of education and methodology of teaching, the director of pedagogical apprenticeship (a university graduate, a certified secondary school teacher)³³. Moreover, the Secondary School employed some part-time teachers working in the Humanist Secondary School and the Administration and Trading Secondary School. The part-time teachers included fr. Henryk Dorembowicz, religious education (MA in theology), Genowefa Krzywicka,

³⁰ *Ibid.*, 18th May 1947.

³¹ *Ibid.*, 5th August 1947.

³² Zdziarska, *V sprawozdanie roczne z pracy Liceum Pedagogicznego SMO w roku szkolnym 1947/48 (od 16 sierpnia 1947 -do 29 lutego 1948)* [5th Annual Report from the Work of the Teacher Training Secondary School of SMO in the School Year 1947/48 (from 16th August 1947 to 29 February 1948)], PISML, Archives Ref. No: A. VIII.12/11.

³³ *Id.*, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)*, cit.

crafts and drawing (a certified primary school teacher), Leopold Kundycki, mathematics (a graduate of a university of technology), Lucyna Piskorska, physical exercises, games and plays (two years of studies in the Central Institute of Physical Education in Warsaw), Franciszek Rożynek, singing, playing an instrument, choir (a certified secondary school teacher), Tadeusz Szela, biology (a certified secondary school teacher), Teresa Świdrygiełło, English (eight years of a junior high school), Ilona Urbańska, physics and chemistry (a certified secondary school teacher), Danuta Lubczyńska, Polish language and literature³⁴. In the first year of the school's functioning there were not enough teachers of pedagogical subjects, and there was not a military training instructor.

In the school year 1944/45, Józef Moraczewski and Stanisław Sztaba left the group of full-time teachers. However, the following people were employed as full-time educators: Helena Biłogan, Polish language and literature (MA in philosophy, a certified secondary school teacher), H. Kamińska, singing and playing the piano (the Music Conservatory, a certified secondary school teacher), fr. Czesław Pawlak, religious education (a seminary for priests), second lieutenant W. Węglewski, the history of education, pedagogy (the Higher Teaching Course, a certified secondary school teacher), second lieutenant Antoni Stelmach, mathematics, the methodology of teaching, the director of pedagogical apprenticeship (a university graduate, a certified secondary school teacher).

The teaching staff became more and more stable, although some personnel changes were still taking place. In the school year 1945/46 Helena Biłogan left the Secondary School, and the new employees were: Maria Basińska (MA in philosophy, a certified secondary school teacher) and Evelina Musallam, English (a certified secondary school teacher). In the school year 1946/47 fr. Czesław Pawlak and Maria Basińska quit the group of teachers, and the new employees were: fr. Józef Czapiewski, religious education (a seminary for priests), Walerian Kwiatkowski, PhD (previously employed in the Humanist Secondary School) and Dawid Jarząbek, MA, geography, biology (previously employed in the Humanist Secondary School). Some teachers performed the function of class supervisors. Due to the fact that the students lived in a dormitory, the tasks of those teachers also included the activities of boarding school educators in the school years 1943/44 - 1944/45. They had support the girls 24 hours a day. In 1945/46 and 1946/47, these tasks were fulfilled by the staff of the company, i. e. the ladies who performed the following functions: the commandant of the company, the company chief, and the military training instructor (for some time the instructor was Irena Müller). The school doctor was M. Lisowski who also taught hygiene at school³⁵.

³⁴ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., p. 375.

³⁵ Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)*, cit.

Significant changes in the teaching staff also occurred after the school's departure for Foxley. Already in Palestine, at the beginning of the school year 1947/48, the following teachers left: Evelina Musallam, W. Weglewski, Antoni Stelmach. In England, fr. Józef Czapiewski and Szczesna Kluk quit the job. In Foxley, the following teachers were transferred from the Humanist Secondary School to the Pedagogical Secondary School: Janina Hobler, MA – Polish language and literature, Stanisław Leja – mathematics, Eugeniusz Bałandiuk – pedagogy and the history of education, fr. Nikodem Urzędowski – biology, and C. Mikołajczuk, a teacher of a junior high school in Foxley – the methodology of teaching and pedagogical apprenticeship. This teaching staff worked until the beginning of 1948, i. e. up to the time when the school was closed³⁶.

It should be emphasized that the teachers often performed responsible functions in the schools located in the Middle East, e. g. Maria Basińska was the director of the comprehensive junior high school in Ahvaz, Iran, Janina Hobler was the director of the same junior high school in Ein-Karem, and Antoni Stelmach was a teacher in the elite Junak School of Cadets. Before taking up work in the teacher training school, most of the teachers had been employed in Polish secondary schools in the country or abroad³⁷.

Students

The girls were admitted to study on the basis of passing the entrance exams. In the first year of the school's functioning, the recruitment took place as late as in February 1944. In the following years, it was organised every June. For example, on 21-24th June, the entrance exams comprised religious education, Polish language and literature, and English (Evelina Musallam). Not many students managed to pass the exams, so the whole recruitment procedure was not very long³⁸. The last entrance exams for the Secondary School were carried out on 16-18th June 1947³⁹. The exact number of girls admitted for the first year of studies is presented in table no. 1:

³⁶ Id., *V sprawozdanie roczne z pracy Liceum Pedagogicznego SMO w roku szkolnym 1947/48 (od 16 sierpnia 1947 - do 29 lutego 1948)*.

³⁷ The lists of teachers in Polish schools in the Middle East. PISML, Archives Ref. No: A. 19. II/6. After returning to Poland, Antoni Stelmach became the director of the pedagogical secondary school in Zgierz near Łódź in 1948. Under his supervision, the school achieved great educational results.

³⁸ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 21st June 1946, Vol. II.

³⁹ *Ibid.*, 12th June 1947.

Table 1. Entrance exams for studying in class 1

Year of studies	School year	The number of girls who passed the exams for class I
I	1943/44	35
II	1944/45	25
III	1945/46	39
IV	1946/47	24
V	1947/48	26
-	Razem	149

Source: E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)* [General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers in 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

Not all the students who passed the exams started studying at the Secondary School. It is confirmed by the number of girls in grades I included in table no. 2. A small part of the students of the school had started studying in comprehensive junior high schools in Poland, and completed the studies in exile. However, most of them only managed to complete the primary school, after which they were deported into the middle of the USSR. From the school year 1945/46, the Secondary School students included the girls who started comprehensive junior high schools in the USSR and finished them, in the shorter period of time, in Nazareth. The students from the recruitment of 1946/47 and 1947/48 even attended the highest classes of primary schools in exile. Twenty-four students of the Secondary School were recruited from the Women's Auxiliary Army Corps. They served in sanitary, transport and communication companies. Four students came from Poland through Germany and Italy as the members of the Home Army in the Polish underground state⁴⁰.

Due to the fact that most students suffered the difficulties of the deportation into the remote parts of the USSR, their level of education was 1-3 years lower than it should be at their age. Only a very small number of the girls attended school in compliance with their year of birth. It is confirmed by the data included in table no. 2. The numbers of students whose educational level matched the age were underlined.

⁴⁰ Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944 - 1948 (luty)*, cit.

Table 2. The students of the first grades according to the year of birth

School year	The students' years of birth							Total	% of years matching class I <u>underlined number</u>
	1923 and earlier	1924	1925	1926	1927	1928	1929		
1943/44	10	14	3	<u>6</u>	-	-	-	33	18.2
1944/45	2	5	7	<u>7</u>	<u>2</u>	-	-	23	39.1
1945/46	3	4	10	14	<u>5</u>	<u>1</u>	-	37	16.2
1946/47	2	6	7	7	2	-	-	24	0
1947/48	-	-	1	2	8	12	<u>3</u>	26	11.5
Total	17	29	28	36	17	13	3	143	-

Source: E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944 - 1948 (luty)* [General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers in 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

The percentage of the girls whose educational level matched their age was not high, as it varied from 11.5 % to 39.1%. It is worth noting that as many as 11.8 % girls were born in 1923 and earlier, while in the first year of the school's functioning there were more than 30% of such students.

Apart from the high number of students who were too old for the grade they attended, the school faced upbringing and emotional problems that resulted from the lack of proper parental care for the girls. Only 33.6% had both a mother and a father. Other girls were either orphans or half-orphans. The data concerning this issue is included in table no. 3.

Table 3. First grade students and their parents

School year	% of orphanhood			
	orphans	half-orphans	lost father	full family
1943/44	21.0	33.0	30.0	16.0
1944/45	12.5	37.5	25.0	25.0
1945/46	8.0	37.0	18.0	37.0
1946/47	14.3	38.1	14.3	33.3
1947/48	0.0	43.0	00	57.0

Source: E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944 - 1948 (luty)* [General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers in 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

A significant number of orphans and half-orphans was enlarged by a high percentage of lost fathers. Moreover, some of the girls' parents lived in Poland and other European countries, or they remained in the USSR. The lack of

contact with the parents exerted a bad influence on the girls and hindered the school's everyday life. In this situation, the boarding school was like a home to many of the students. Their bonds with friends and teachers were very strong.

The social structure of the group of students was similar to that which existed in the pre-war teacher training seminars and secondary schools in Poland. The children of farmers, as well as auxiliary and service workers, constituted the largest part of the students. In the first year of studies they constituted 70% of the students; in the second – 85%; in the third – 89%; in the fourth – 83.2%; and in the fifth year – 71.4%. More information is given in table no. 4.

Table 4. The social structure of the first grade students

School year	Father's profession - %		
	farmer (settler)	lower-ranking clerk	soldier, freelancer
1943/44	26.4	43.6	30.0
1944/45	66.6	18.4	15.0
1945/46	54.0	35.0	11.0
1946/47	47.6	35.6	17.4
1947/48	71.4	-	28.6

Source: E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944 - 1948 (luty)* [General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers in 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

The students did not give up despite the difficult circumstances which included their low educational level, tragic experience in the “inhumane land”, uncertain future in exile, and the lack of parents and other family members. While studying at the Secondary School, the girls worked hard trying to make up for the lost time and use the opportunity to obtain secondary education and a teacher's certificate. According to Emilia Zdziarska, the class that started studying in 1944 was the best – the girls just “devoured knowledge”. Similar results were achieved by the girls studying within the years 1945/46. They were the most brilliant students in the history of the Teacher Training Secondary School⁴¹.

⁴¹ Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)*, cit.

Plans and curricula

The activity of the Teacher Training Secondary School was based on the already quoted act on the education system of 11th March 1932, and on the regulation of the minister of religious denominations and public enlightenment of 6th March 1937 on the organisation of the state teacher training secondary schools⁴². A candidate for the first year of studies could be a student aged at least 16 who graduated from a four-year comprehensive junior high school. The Secondary School carried out its activity in very difficult conditions. There was no agenda and curriculum for a two-year educational cycle. There were no (especially at the beginning) handbooks of pedagogy and other educational aids. The teaching staff, supervised by Emilia Zdziarska, prepared the agenda and the curriculum of the school. The agenda was very ambitious and despite the fact that the time of studies was a year shorter than in a three-year secondary school, the most important subjects were assigned the same number of lessons and, in case of mathematics, there was one lesson more than in the three-year course. A foreign language (English), which was treated in the Polish curriculum as optional, became (for obvious reasons) obligatory in Nazareth, with a large number of lessons per week. Also, playing an instrument became an obligatory subject⁴³. The school's teaching staff aimed at transforming the two-year Secondary School into a three-year school. However, they did not manage to do this because it was necessary to educate teachers as soon as possible. The number of lessons per each subject, prepared by the school's teaching staff for the needs of the two-year course, is presented in table no. 5.

Table 5. The number of lessons in the Teacher Training Secondary School in Nazareth, 4th July 1944

Subject	Class		Remarks
	I	II	
Religious education	2	2	-
Polish	4	4	-
English	3	3	-
History	2	2	-
Mathematics	3	3	-
Physics	2	-	-
Biology	2	-	-
Crafts	2	2	-

⁴² «Official Journal the Ministry of Religious Denominations and Public Enlightenment», n. 3, 1937, item 56.

⁴³ *Program nauki (tymczasowy) w państwowym liceum pedagogicznym z polskim językiem nauczania* [(Temporary) Curriculum in a State Teacher Training Secondary School with Polish as the Language used by Teachers], Lviv, 1938, p. 21.

Drawing	1	1	-
Singing	1	1	-
Physical exercises	2	2	and 2 hours of games and plays per week
Playing an instrument	1	1	-
Military training	1	1	-
Hygiene	-	0/1	since the second semester
Propaedeutics of philosophy, history of philosophy, ethics, logic, methodology	3	2	-
Child's life and general psychology	6	-	-
History of education	2	2/0	it ends in the first semester
Pedagogical apprenticeship	0/2	8	In class I visited lessons and related issues of general methodology [since the second semester]
Methodology	-	2	-
Pedagogy	-	0/2	since the second semester in class II

Source: W. Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie* [On the Activity of the Teacher Training Secondary School in Nazareth]; *Człowiek idea dzieło. Prace dedykowane Profesor Stefanii Walasek* [Man, Idea, Work. Texts Dedicated to Professor Stefania Walasek], Wrocław, Chromcon Publishing House, 2013, pp. 377.

This agenda was corrected in December 1944 and it was fulfilled until the end of that school year. The teaching staff prepared the curricula for all the subjects. They were based on memorized, pre-war school curricula. The preparation of such curricula was difficult due to the fact that pedagogical secondary schools only appeared in Poland in 1937 and, as three-year schools, they did not manage to fulfil the whole course of studies because of the outbreak of the war. Thus, there was no experience to which the teachers could refer. A few teachers of the Secondary School, including the principal, used to attend five-year teaching seminars based on a seven-year comprehensive school. Such teaching seminars were the predecessors of teacher training secondary schools. Those teachers tried to use their knowledge and experience while preparing the curriculum for the Pedagogical Secondary School. They particularly emphasized pedagogical subjects, reducing the curriculum of comprehensive subjects. Stanisław Sztaba was responsible for preparing the curricula of pedagogical subjects, mathematics, physical exercises, crafts, drawing, military training, English, singing, and playing an instrument. The curricula for physics and chemistry were prepared by Halina Urbańska. Zofia Kiper elaborated the curriculum for Polish, history and contemporary issues⁴⁴.

In the school year 1945/46, the educational authorities introduced a new agenda and curriculum for teacher training secondary schools. The documents

⁴⁴ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., pp. 382-383.

were prepared in London, upon the request of MWRiOP, by the teachers working in pre-war Poland supervised by Jan Konopnicki, PhD. The group of those teachers included Stanisław Myćko – a teacher of pedagogical subjects in a teacher training secondary school, and Wacław Szomek – a teacher of psychology, history of education and methodology in the Teacher Seminar in Ostrzeszów. While preparing the curriculum for the ministry, they referred to the curriculum of the 4th and 5th grade of a teacher seminar with regard to pedagogical subjects, to the curriculum of mathematical and physical subjects for a humanist secondary school, and to the curriculum of humanist subjects for a mathematical-physical secondary school. These contents were completed with some elements of the curricula of detailed methodologies of teaching subjects obligatory in comprehensive schools, as well as the curricula of craft classes and singing classes valid in Scottish schools. Just like in the curriculum from Nazareth, teaching English was emphasized as obligatory⁴⁵.

In order to make use of all the time spent with the students, all of whom lived in the boarding school, the teachers organized many additional activities in the afternoon which helped to extend the girls' knowledge. School clubs, such as a geography, Polish and photography club were very popular, as well as the school choir. In the first grade, starting from the second semester, the students actually spent 42-44 hours per week studying, and in the second grade – 43-45 hours. The students truly wanted to learn and they constantly took up new challenges. They did not have much time to practice sports and carry out leisure activities. Because of the fact that the location of Nazareth was attractive in terms of history, culture and religion, the teachers often took the students for educational trips that significantly improved the girls' historical, scientific and geographical knowledge⁴⁶.

The students of the Secondary School achieved different educational results. For example, for the first semester of the year 1946/47, among the 17 first-grade students, 12% obtained the general 'very good' mark; 41% – the 'good' mark, 12% – 'satisfactory', and 35% – 'unsatisfactory'. In the second grade there were 31 students. 13% of them obtained the general 'very good' mark; 40% – 'good'; 40% – 'satisfactory'; and 7% – 'unsatisfactory'⁴⁷.

⁴⁵ Id., *Przygotowanie kadr oświatowych na uchodźstwie w latach 1941-1948*, cit., p. 120.

⁴⁶ Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)*, cit.

⁴⁷ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 30th March 1947, Vol. II.

Pedagogical apprenticeship

Just like in pre-war teacher seminars and teacher training secondary schools, pedagogical apprenticeship was an inseparable part of teachers' education that shaped their knowledge and professional skills. The Secondary School paid much attention to shaping the students' pedagogical skills. The apprenticeship was carried out in compliance with the *Project of the Apprenticeship Regulations in the Teacher Training Secondary School for Younger Volunteers*⁴⁸. The project, approved by the principal of the Secondary School, became obligatory. It was based on the two-year curriculum and the project of teaching apprenticeship. The document specified the scope of the competences of the apprenticeship director and the way the apprenticeship was to be carried out. Visiting lessons, teachers' model lessons and trial lessons of the students were very important in the course of the apprenticeship. Also, it was important to shape the students' skills related to working after classes and dealing with administrative and economic issues of comprehensive schools⁴⁹.

Stanisław Sztaba, Antoni Stelmach, Dawid Jarząbek and C. Mikołajczuk, respectively, were responsible for the methodology of teaching, and especially for the fulfilment of the pedagogical apprenticeship. Prof. Antoni Stelmach was the most successful in supervising the apprenticeship. For the purpose of the Secondary School, he prepared a consistent, extensive and very good *Project of Teaching Apprenticeship in the Two-Year Teacher Training Secondary School*⁵⁰, which, after introducing some minor corrections, was approved by lieutenant Tadeusz Poźniak PhD, the director of sciences of the Junak School Command. The project emphasized that the implementation of the students' skills into the professional practice was a responsibility of not only the apprenticeship director, but also of all the Secondary School's teachers. It was underlined that in the first semester of the first year the girls should get to know the general methodology of teaching, and in the second year they are to master the methodologies of teaching particular subjects in a primary school. The latter task was to be fulfilled by the teachers of particular subjects in the Secondary School. The apprenticeship was carried out in the Primary School for Younger Volunteers in Nazareth (grades V-VII), in the Junak Primary School for Boys, in the civilian Primary School in Ein - Karem (the youngest grades), and in one of Jerusalem kindergartens. The apprenticeship was intensive and it started in the second semester of the first grade (2 hour per week), after the students made themselves familiar with the general methodology of teaching. It included visiting model lessons conducted by professional teachers, discussing these

⁴⁸ Odpis. Projekt regulaminu praktyki pedagogicznej w Liceum Pedagogicznym Młodszych Ochotniczek [Project of the Apprenticeship Regulations in the Teacher Training Secondary School for Younger Volunteers], PISML, Archives Ref. No: A. 74/42.

⁴⁹ *Ibid.*

⁵⁰ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., pp. 387-395.

lessons, and successive completion of a notebook with remarks on particular children. Detailed guidelines were specified with reference to the fulfilment of these tasks⁵¹.

Each student of the Secondary School had to make notes about one girl from the primary school in Nazareth. The notes were taken in a special notebook. The students performed this task in a very diligent manner: «in order to trace the child's psychological and intellectual development, our students are trying to get to know the souls of young children so that they can become their truly committed and warm guardians. Thus, they sit with the children in the garden, talk, listen to various confessions. It is such a pretty image. Sometimes you can see small groups of girls in the garden: a small volunteer accompanied by her elder guardian. These young 'mothers' are so sweet in their new roles, and the small kids are so happy, exchanging opinions on their teachers and boasting whose guardian is better»⁵².

In the second grade, the pedagogical apprenticeship was to take 7 hours per week. It was fulfilled along with the methodology of teaching particular subjects, and the curriculum assumptions of grades I-IV were discussed. The teaching apprenticeship included: 1) visiting a lesson conducted by teachers; 2) spending a whole day at a primary school, 3) watching trial lessons of particular students, 4) conducting trial lessons in the presence of the apprenticeship director, the school principal and the teachers of a particular grade or subject, 5) analysing the visits to trial lessons, 6) participating in the organisation of breaks between the classes and afternoon activities. Also, the apprenticeship included other activities, such as visiting and conducting trial lessons in joined classes, filling in the school register, reading the school's projects and organisation sheets, visiting kindergartens, common rooms and other educational and upbringing institutions⁵³.

The first trial lessons, preceded with the observation of children, were conducted by second-grade students in November 1944, in the presence of the director of the pedagogical apprenticeship, Antoni Stelmach. Emilia Zdziarska also watched them if she had enough time. Other students also watched the classes conducted by one of them, analysing them and paying attention to the compliance of the course of the lesson with the plan. Then, after the lesson they discussed the applied methods and the course of the lesson. On 17-19 December 1944, the second grade of the Teacher Training Secondary School visited some lessons in Ein-Karem, mainly in grades I and II of the primary school. Also, the girls visited the kindergarten. Antoni Stelmach and the class supervisor, Zofia Kiper⁵⁴, went to Ein-Karem with the students. A similar apprenticeship session

⁵¹ *Ibid.*, pp. 387-390.

⁵² Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 19th December 1944, Vol. I.

⁵³ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., pp. 390-395.

⁵⁴ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim*

was organised in the same town on 25 – 30th September 1946. Antoni Stelmach and the class supervisor, Zofia Lisowska took 30 students on that trip. Visits to the lessons and trial classes were conducted during the apprenticeship. Also, the students visited some classes in a military kindergarten in Jerusalem. In their free time, the girls did some sightseeing in the places important for the religious cult. During the apprenticeship sessions, the girls were truly active and interested in educating children⁵⁵.

After the Secondary School was evacuated to Great Britain, the apprenticeship was developing well under the supervision of C. Mikołajczuk. In a short school year 1947/48, which only lasted until the end of February, each of the second-year students conducted at least three trial lessons in the Foxley camp, and most of them conducted five trial lessons. There were 10 conferences after watching a lesson. In grade 2 there were 24 model lessons conducted by teachers, and in grade 1 there were five of such lessons watched by the students. The contact with primary school children was enjoyable and satisfactory for the girls⁵⁶.

Upbringing activities were carried out on the basis of the plan prepared for SMO and based on the guidelines of the Junak School Command. The main task of the teaching staff in the Teacher Training Secondary School was to bring up Polish teachers who are aware of their tasks and obligations, and who are patriotic and altruistic citizens⁵⁷. This plan was implemented in the upbringing tasks formulated for each class. The degree of its fulfilment was analysed at upbringing conferences of the teaching staff. W. Węglewski, a great pedagogue, was particularly successful in bringing up the secondary school girls within the school years 1945/46 and 1946/47. Outstanding specialists in different areas of life were invited to give lectures at the school. For example, on 25th March 1947, a psychiatrist, Wiktor Szaryński PhD gave a lecture on acquired, inborn and inherited intelligence⁵⁸. The above mentioned Łukasz Kurdybacha visited the school several times. Also, professor Stanisław Kościłakowski and other lecturers of the Polish Study in Beirut, visited the school. The teaching staff did their best to educate good teachers with a deep pedagogical knowledge, good manners and proper cultural background, so that in future they could give children wisdom and shape the patriotic attitudes necessary in a free homeland. Due to the bad political situation in Poland, the latter issue was particularly analysed, especially in terms of a possible return to the country. The activity of youth and social organisations was also an important aspect of upbringing

Wschodzie, cit., 27th November 1944, Vol. I.

⁵⁵ *Ibid.*, vol. II, n. 25, 30th September 1946.

⁵⁶ Zdziarska, V *sprawozdanie roczne z pracy Liceum Pedagogicznego SMO w roku szkolnym 1947/48 (od 16 sierpnia 1947 - do 29 lutego 1948)*, cit.

⁵⁷ Bauer, Kosińska, Kossakowska (edd.), *Książka pamiątkowa Szkół Młodszych Ochotniczek*, cit., p. 39.

⁵⁸ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 25th March 1947, Vol. II.

work. Such organisations included the Polish Scouting Association, the Sodality of Our Lady, and the Polish Red Cross⁵⁹.

Secondary school finals

The final examinations were the crowning of the students' two-year studies at the Teacher Training Secondary School. The exams were conducted on the basis of the *Temporary Regulations Concerning the Examinations for a Primary School Teacher*⁶⁰, approved by the representative of MWRiOP in Jerusalem – Józef Follprecht, who was treated as the pre-war school superintendent. Based on the regulations, he established the members of the National Examination Commission comprised of the chairman and examiners of particular subjects included in the scope of the exams.

According to the regulations, the exams could be organised for:

- 1) graduates of state teacher training pedagogical secondary schools or secondary schools functioning on the basis of state laws,
- 2) candidates with the certificate of a secondary school completion (additional exams),
- 3) extramural students.

Written final exams for the secondary school students included: 1) Polish language and literature, 2) a modern foreign language, 3) pedagogy with the history of education.

According to the regulations, the Polish exam was to last 5 hours, and other exams were to last 3 hours. The exams were organized according to strictly specified principles. Their course was reflected in a protocol. The marks given by particular examiners had to be justified in writing. Just before oral exams, an examiner of a particular subject prepared a written set of questions for each candidate for a teacher. The oral exams included the following subjects: religious education, Polish language and literature, a modern foreign language, pedagogy with the history of education, and psychology with the knowledge of a child, as well as one of the following: history with the elements of contemporary life, geography, mathematics, physics with chemistry and biology. In some cases, it was possible to release a graduate from the obligation to pass an oral exam from some subjects. After the exams ended, the examination commission wrote an exam report in which they could formulate an opinion on the course of the exams, their results and the preparation of the graduates.

⁵⁹ *Ibid.*, vol. 2, n. 3, 24 February 1947.

⁶⁰ Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., p. 383.

The certificate of a primary school teacher obtained after the exams made it possible for young teachers to temporarily teach in public and private primary schools (until the second exam passed while working at school), and it enabled them to take up university studies according to the regulation of the minister of schooling and higher education⁶¹.

In 1947, the last final exams at the Teacher Training Secondary School in Nazareth took place. The written topics during the Polish exam were (the students were to choose one of them): 1. «Konopnicka and Kasprówicz in the fight for social justice»; 2. «Suffragists and community workers in Polish literature»; 3. «Asnyk's quatrain: 'Trzeba z żywymi naprzód iść, po życie sięgać nowe' [We have to go forward with the living and reach for new life] with reference to us as immigrants». The first topic was chosen the most often. The pedagogical topics were as follows: 1. «The main thoughts and the evaluation of the activity of the Commission of National Education»; 2. «The influence of the French Revolution on people's education in the 19th century»; 3. «Develop and justify the thought expressed in the sentence: an individual's upbringing is carried out in a social manner». The English topics were as follows: 1. «Write a letter to an English friend telling her of your plan for the next year»; 2. «Write a letter to an English friend telling her about any famous man in the history of our country»; 3. «Translation: 'Viest' a passage taken from Valrsh Reader». The first grade of the Secondary School organised a great goodbye evening for their friends, with the participation of the teaching staff. During the meeting, the girls talked about their uncertain future and about all the difficulties related to taking up a teacher's job. All the participants of the celebration were aware of uncertain future, temporariness and the lack of stability. Nevertheless, the celebration was a great experience and it left the girls with beautiful memories⁶².

The last secondary school finals in the Teacher Training Secondary School took place in the Foxley camp in Great Britain. The written exam was organized on 20th and 21st February 1948. This date was connected with the decision of the Committee for Education of Poles in Great Britain to close, on 29th February, the School for Younger Volunteers which comprised the Teacher Training Secondary School. The final examinations were passed by 17 graduates of the Nazareth Secondary School and 4 graduates of the school in Valivade in India (based on the permission of the Committee for Education of Poles in Great Britain). The Polish exam topics included: 1. «The idea of fighting for freedom expressed by the three greatest Polish poets (5 graduates chose this topic); 2. «The nature of Polish positivism and its attitude towards romanticism (15 graduates chose the topic); 3. «A woman during the last

⁶¹ *Temporary Regulations Concerning the Examinations for a Primary School Teacher*, PISML, Archives Ref. No: A. 74/42; *Typescript of a primary school teacher certificate*, in *ibid.*; W. Chmielewski, *Z działalności Liceum Pedagogicznego w Nazarecie*, cit., pp. 383-385.

⁶² Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 20th May 1947, Vol. II.

war. Her current and future tasks» (one graduate chose this topic). The topics related to pedagogy and the history of education were as follows: 1. «Stanisław Konarski as a citizen, pedagogue and reformer of school» (15 graduates chose this topic); 2. «Passive school and active school» (none of the graduates chose this topic), 3. «Obedience in new pedagogical views» (6 graduates chose this topic). Three students obtained the secondary school certificate with the 'very good' mark, eight students – with the 'good' mark, and ten students with the 'satisfactory' mark⁶³. The official closing of the school year took place on 28th February 1948. The large group of guests included the representatives of the Committee for Education of Poles in Great Britain: Stanisław Szydłowski and Tadeusz Sulimirski⁶⁴.

In total, the Teacher Training Secondary School issued 106 certificates of primary school teachers, including 100 certificates for their graduates, 4 – for the graduates of the similar Teacher Training Secondary School in Valivade in India, and 2 for civilian extramural students. Detailed information is included in table no. 6.

Table 6. The certificates of primary school teachers

School year	Graduates of year II	Students who took the exams	Other people who took the exams
1944/45	31	31	-
1945/46	24	23	-
1946/47	30	29	2 civilian extramural students
1947/48	17	17	4 graduates of the Teacher Training Secondary School in Valivade
Total	102	100	6

Source: E. Zdziarska, *Ogólne sprawozdanie z pracy Młodszych Ochotniczek z pracy Liceum Pedagogicznego Młodszych Ochotniczek w latach 1944-1948 (luty)* [General Report from the Work of Younger Volunteers in the Teacher Training Secondary School for Younger Volunteers in 1944-1948 (February)], PISML, Archives Ref. No: A.VIII.12/11.

Almost all the graduates were girls deported from Poland to the USSR during the war. Also, the majority of them were the graduates of Junak junior high schools. Thus, the students and graduates of the Secondary School were close friends to one another and to the teachers. They constituted one loving family. Eight graduates decided to study at universities or other higher education

⁶³ *Ibid.*, vol. 12, 29th February 1947; Zdziarska, *V sprawozdanie roczne z pracy Liceum Pedagogicznego SMO w roku szkolnym 1947/48 (od 16 sierpnia 1947 - do 29 lutego 1948)*, cit.

⁶⁴ Dąmbrowska, *Kronika Szkoły Młodszych Ochotniczek przy Armii Polskiej na Bliskim Wschodzie*, cit., 28th February 1948, Vol. II.

schools, two of them were offered a teacher's job in Polish primary schools in England, and the remaining group did not yet decide where to work in future⁶⁵.

Conclusions

Summing up the considerations on the Nazareth teacher training secondary school, we have to admit that the school was a great achievement of Polish military and civilian schooling in exile during the Second World War. Along with the teacher training schools in Lubeck (Germany) and Valivade (India), the Nazareth school was a very important place for educating teachers on the secondary level. The level of the didactic and educational activities carried out in the school was very high. The school reliably fulfilled its task to prepare teachers to work in primary schools in Poland and abroad. The school's hard educational work resulted not only in the preparation of qualified primary school teachers, but also in shaping truly patriotic citizens who loved their country and wanted, if possible (depending on the political situation), to work in Poland for the good of the future generations. Unfortunately, because of the political reasons, the girls' knowledge, skills, as well as their enthusiasm and predispositions for working with children have not been properly used. However, the school's organisational efficiency, as well as the students' and the teachers' commitment, deserve our attention and admiration. It is a great example of fortitude, courage and hard work done with the hope for a better future that is free from war and injustice, and that enables young people to live and work in better, peaceful times. Almost all the graduates remained in exile due to political reasons. Despite the difficult beginnings in foreign environments, they managed to adjust to the existing living conditions and maintain youth friendships. The graduates of SMO, including the Teacher Training Secondary School, organised meetings and conferences, exchanged letters, and even published a valuable *Commemoration Book of the Schools for Younger Volunteers*. It is also worth mentioning that the teaching staff of the school were truly respected by the students. The Teacher Training Secondary School in Nazareth constitutes a beautiful part of the history of educating teachers in Europe.

⁶⁵ Zdziarska, V *sprawozdanie roczne z pracy Liceum Pedagogicznego SMO w roku szkolnym 1947/48 (od 16 sierpnia 1947 - do 29 lutego 1948)*, cit.

Religione, educazione civica e morale negli scritti politici di Paolo Mantegazza. Profilo e militanza parlamentare di un «laico religioso»

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*Religion, Civic and Moral Education in Paolo Mantegazza Political Writings.
Biographical Profile and Parliamentary Militancy of a «Religious Layperson»*

ABSTRACT: Starting from a reconstruction of the political profile of Paolo Mantegazza as a member of the Chamber of Deputies, this article aims to show how Mantegazza himself had tried to promote the formation of a new and cohesive national identity. As a matter of fact, by his pedagogical project he had tried to reconcile the positivistic faith in science with political education and religious feeling, within a secular, but not for this reason anti-Christian, culture.

EET/TEE KEYWORDS: Paolo Mantegazza; Civic education; Political education; Religious feeling; Italian identity; Italy; XIXth Century.

1. *Un uomo in-adatto alla vita politica*

Una volta concluso il processo di unificazione nazionale, l'Italia, sebbene unita sotto l'aspetto territoriale, presentava ancora una realtà culturalmente e economicamente frammentata. Le differenze tra il nord e il sud, il basso tasso di alfabetizzazione, la difficoltà di accesso, per il proletariato, alle fonti del sapere extra-scolastico, e il peso delle prime due guerre d'indipendenza, costituiscono solo alcuni degli elementi che avevano reso necessario un intervento politico-istituzionale ai fini del risanamento nazionale¹.

¹ A titolo puramente esemplificativo, su questi temi si rimanda A.M. Banti, *Il risorgimento italiano*, Roma-Bari, Laterza, 2009.

Sotto il profilo igienico-sanitario, la diffusione di malattie epidemiche, quali il colera e la tubercolosi, insieme con la generale ignoranza delle norme profilattiche alla base della più rudimentale scienza igienica, avevano messo in crisi le condizioni della sanità pubblica del Paese. L'insieme di questi fattori e l'assenza di un profondo e condiviso sentimento patriottico, avevano rappresentato alcuni degli ostacoli alla formazione di una identità nazionale sana e coesa².

A partire dalla seconda metà dell'Ottocento, nella neonata Italia, animata dai principi a fondamento della cultura positivista, che aveva individuato nella scienza lo strumento principe del progresso umano, si affermò una nuova figura di intellettuale: lo scienziato-popolare politicamente impegnato.

Esempio di questa nuova figura di intellettuale fu Paolo Mantegazza. Meglio noto per il suo coinvolgimento nelle vicende e nei dibattiti *scientifici* della cultura positivista, Mantegazza, nato a Monza il 31 ottobre 1831 e morto a San Terenzo di Lerici (La Spezia) il 28 agosto 1910, anatomo-patologo, igienista, docente di patologia generale e sperimentale dal novembre 1858 presso l'Università degli studi di Pavia, professore ordinario di antropologia all'Istituto di studi superiori di Firenze a partire dal 28 novembre 1869, «introdotto del romanzo scientifico»³ e, in generale, tra i più grandi divulgatori della seconda metà del XIX secolo, partecipò attivamente anche alla storia politica del Regno d'Italia⁴.

Seguendo la madre Laura Solera a Milano nel 1836, dove si formò dapprima presso la scuola elementare Boselli e successivamente al liceo ginnasio, Paolo

² Sulle difficoltà con cui dovettero confrontarsi le istituzioni politiche del Paese e sugli interventi promossi, in seno all'editoria e alle istituzioni scolastiche, a seguito dell'unificazione, ai fini della formazione di un'identità nazionale culturalmente coesa, si veda S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, Bologna, il Mulino, 1993,

³ R. Barbiera, *Paolo Mantegazza*, «L'illustrazione italiana», vol. 37, n. 36, 4 settembre 1910, p. 228.

⁴ Per un profilo biografico dettagliato di Paolo Mantegazza si veda, in primo luogo, la biografia del suo contemporaneo C. Reynaudi, *Paolo Mantegazza. Note biografiche*, Milano, Treves, 1893. Circa la letteratura secondaria sul tema, a causa dell'eccessivo eclettismo di Mantegazza, ciascuno degli studi prodotti privilegia un aspetto specifico della sua vita e del suo attivismo politico, scientifico e pedagogico. Tra i diversi studi condotti, si rimanda a F. Cianfriglia, *Profilo biografico di Paolo Mantegazza*, in C.F. Casula, *L'isola bella e infelice*, Sassari, Carlo Delfino, 2016, pp. 47-58; Ead., *Paolo Mantegazza 'poligamo di molte scienze' (1831-1910). Organizzazione culturale, divulgazione scientifica e attività politico-istituzionale nell'Italia postunitaria*, in G. Atzei, A.G. Orlandini Carcreff, T. Manca (edd.), *Paolo Mantegazza. Dalle Americhe al Mediterraneo*, Monaco, LiberFaber, 2014, pp. 9-21; W. Pasini, *Paolo Mantegazza ovvero l'elogio dell'eclettismo*, Rimini, Panozzo, 1999, pp. 53-75; Id., *Paolo Mantegazza, deputato e senatore del Regno*, in C. Chiarelli, W. Pasini (edd.), *Paolo Mantegazza. Medico, antropologo, viaggiatore*, Firenze, Firenze University Press, 2002, pp. 119-130; P. Govoni, *Mantegazza, Paolo*, in A. Clericuzio, S. Ricci (edd.), *Il contributo italiano alla storia del pensiero*, Appendice VIII della *Enciclopedia Italiana di Scienze, Lettere ed Arti*, Vol. IV, Scienze, Roma, Istituto della Enciclopedia Italiana, 2013, pp. 392-396.

fu militarmente impegnato già a partire dall'età di 16 anni, partecipando attivamente nel corso delle Cinque giornate di Milano (18-22 marzo 1848)⁵.

Mantegazza, che nel corso della sua vita fu anche viaggiatore, antropologo, psicologo, divulgatore scientifico e fotografo⁶, votò la sua intera esistenza all'educazione fisica, morale e politica degli italiani, nella convinzione di poter contribuire alla costruzione di un'identità nazionale forte e coesa.

Persuaso che mai avrebbe sacrificato la scienza alla politica ma che tutt'al più questa si sarebbe configurata come ancella della scienza e del progresso scientifico, la militanza politica servì a Paolo Mantegazza per sollevare, in seno all'opinione pubblica e agli organi istituzionali, questioni rilevanti per ciò che atteneva al miglioramento delle condizioni educative, morali e igienico-sanitarie degli italiani.

La tendenza di Mantegazza a rifiutare qualsivoglia spiegazione della realtà che avesse implicazioni di carattere metafisico, fu il presupposto metodologico a fondamento della sua visione della scienza e della ricerca scientifica. Egli, infatti, riteneva che la scienza costituisse l'unico strumento efficace ai fini della più estesa e intensa comprensione e gestione della realtà umana, tanto sotto il profilo individuale quanto sotto l'aspetto sociale e politico-istituzionale. I progressi della scienza, all'origine del miglioramento delle condizioni morali e igienico-sanitarie del Paese, avrebbero gradatamente condotto l'umanità verso la realizzazione dell'auspicata, seppure utopica, perfetta società civile⁷.

Ciononostante, il rifiuto del valore ermeneutico della religione, intesa quale chiave di accesso alla comprensione della realtà *tout court*, non sarà in contraddizione né con il profondo sentimento religioso che animò la filosofia morale e l'educazione civica proposte da Mantegazza né con il suo feroce e ostentato anticlericalismo.

Eletto deputato il 29 ottobre 1865, rimase alla Camera, dopo aver sconfitto al ballottaggio con più di 240 voti favorevoli il conterraneo e ex deputato filocattolico Carlo Ferrario, dalla IX alla XII legislatura del Regno (1865-

⁵ Sulla prima militanza politica di Paolo Mantegazza, si vedano F. Della Peruta, *Milano nel Risorgimento. Dall'età napoleonica alle Cinque Giornate*, Milano, La Storia, 1992; P. Mantegazza, *A sedici anni sulle barricate di Milano. Conferenza di Paolo Mantegazza*, in *La Vita italiana nel Risorgimento (1846-1849)*, s. 3, Firenze, Bemporad e figlio, 1900, Vol. II, Storia, pp. 7-42; F. Millefiorini, *Nota storico-descrittiva del manoscritto monzese di Paolo Mantegazza con cenni su alcuni aspetti linguistici nel «Giornale della mia vita»*, in Chiarelli, Pasini (edd.), *Paolo Mantegazza. Medico, antropologo, viaggiatore*, cit., pp. 137-144; Ead., *Il 1848 a Milano nel diario di Paolo Mantegazza*, in M.L. Berti, D. Maldini Chiarito (edd.), *Scritture di desiderio e di ricordo. Autobiografie, diari, memorie tra Settecento e Novecento*, Milano, FrancoAngeli, 2007, pp. 333-349; M.L. Pagliani, *Paolo Mantegazza: dalle barricate di Milano al Parlamento italiano*, «L'informazione bibliografica», n. 2, 1994, pp. 195-198.

⁶ Si vedano C. Chiarelli, *Mantegazza e la fotografia: una antologia di immagini*, in Chiarelli, Pasini (edd.), *Paolo Mantegazza. Medico, antropologo, viaggiatore*, cit., pp. 93-97; L. Harris, *Photography of the 'primitive' in Italy: perceptions of the peasantry at the turn of the twentieth century*, «Journal of Modern Italian Studies», vol. 17, n. 3, 2012, pp. 310-330.

⁷ Si veda P. Mantegazza, *L'anno 3000. Sogno*, Milano, Treves, 1897.

1876)⁸. A contraddistinguere la sua militanza fu, senz'altro, un profondo senso di disgusto per il "machiavellico" e corrotto mondo politico. «Io avevo già da un pezzo veduto tramontare la luna di miele della vita politica, e ne vedeva da vicino i tarli antichi e le piaghe nuove», scriveva riferendosi all'esperienza parlamentare del 1868⁹.

Pur sfidando le aspettative dei suoi elettori, dopo essere stato sorteggiato per accompagnare il re Vittorio Emanuele II nella sala dei 500 di Palazzo Vecchio a Firenze, in occasione dell'apertura del Parlamento, Mantegazza si sedette a Destra, vedendo nella Sinistra «gente irrequieta o impaziente [...] più cospiratori che pensatori, più rivoluzionari che uomini politici»¹⁰. Sentendosi liberale, si descrisse come colui che «nel governo non vede un padrone, ma una famiglia di cittadini liberamente eletti a difendere l'ordine e la prosperità del paese» e sa che «le migliori sentinelle a difenderla [la libertà] sono l'ordine e la virtù»¹¹.

I voti contrari all'approvazione della tassa sul macinato e al rincaro del prezzo del sale e la «palla nera» data alla legge delle guarentigie, «dettata dalla paura e scritta dall'ipocrisia», comportarono l'allontanamento del Nostro dalla Destra e il successivo spostamento verso il Centro, da lui definito un organo pronto a accogliere i disertori di entrambi gli schieramenti e che ormai cominciava a pesare sulla bilancia della politica italiana¹². «In politica – scrisse nel 1881 – sto al centro», imitando così il Creatore «il quale ha messo fra gli opposti poli alcune delle cose più belle di questo mondo»¹³. Sebbene la sua prima elezione alla Camera non rispondesse a un profondo sentire politico, la militanza di Mantegazza in Parlamento proseguì al punto che, il 16 novembre 1876, fu proclamato, da Luigi Agostino Casati, senatore¹⁴.

Se l'esperienza parlamentare aveva coinvolto Mantegazza all'interno di molteplici discussioni, certo è che tutta la sua attività politica si tradusse in una sorta di militanza apostolica finalizzata all'educazione morale e alla tutela igienico-sanitaria del popolo italiano.

Persuasero che in una monarchia costituzionale com'era l'Italia l'autorità risiedesse tanto nell'elettore quanto nei delegati istituzionali, Mantegazza vedeva nei membri della Camera coloro che «*deputiamo*, perché presso al Governo

⁸ La proclamazione in Parlamento avvenne nella seduta del 22 novembre 1865.

⁹ Si veda P. Mantegazza, *Ricordi politici di un fantaccino del Parlamento Italiano*, Firenze, Bemporad e figlio, 1897, p. 123.

¹⁰ *Ibid.*, p. 19.

¹¹ P. Mantegazza, *Ordine e libertà. Conversazioni di politica popolare*, Milano, Giuseppe Bernardoni, 1864, p. 25.

¹² Si veda *Id.*, *Ricordi politici*, cit., pp. 167 ss.

¹³ *Id.*, *I miei pensieri di quasi venti anni (1880-1896)*, in L. Zuccoli, *Parvulae. Pagine sparse di Paolo Mantegazza*, Milano, Treves, 1910, pp. 189-190. Le *Pagine sparse di Paolo Mantegazza* costituiscono la seconda parte di quel suo diario da lui definito artistico. Il riferimento è a P. Mantegazza, *La mia tavolozza*, Bologna, Zanichelli, 1878.

¹⁴ Senato del Regno, *Discussioni*, XIII legislatura – Sessione 1876-1877, tornata del 16 novembre 1876. Si veda T. Sarti, *Il Parlamento Italiano nel cinquantenario dello Statuto: profili e cenni biografici di tutti i senatori e deputati viventi*, Roma, Tip. Agostiniana, 1898, pp. 356-358.

centrale si occupino dei nostri interessi»¹⁵. Nel passaggio dall'idealità alla realtà, però, fu costretto a constatare l'incapacità delle istituzioni parlamentari di far fronte alle esigenze nazionali. Il parlamentarismo era «una macchina al rovescio, nella quale s'impegnano forze straordinarie, ma che vanno quasi tutte consunte dagli attriti»¹⁶.

Condividendo la filantropia materna, Paolo Mantegazza iniziò la sua attività parlamentare, su sollecitazione degli elettori di Monza, nella seduta in cui si sarebbe dovuto votare l'indirizzo in risposta al discorso della Corona.

Il primo discorso di Mantegazza si inserì, come egli stesso racconta, in un clima in cui, mentre la Sinistra voleva che la risposta fosse dibattuta così da mettere in discussione l'indirizzo politico del Ministero, la Destra non voleva farne che un completamento, una parafrasi: «una formalità: null'altro»¹⁷. Imbarazzato, in quanto «oscuro gregario, che da pochi giorni e per la prima volta era deputato»¹⁸, nel suo discorso alla Camera, una mozione pregiudiziale, Mantegazza si mostrò fiducioso nel miglioramento delle condizioni dello Stato italiano e, al contempo, molto più disinvolto e polemico di quanto ci si potesse attendere. Ritenendo superflua la discussione intorno all'indirizzo politico del Ministero, Mantegazza apostrofò i suoi colleghi esortandoli a un lavoro che fosse realmente proficuo:

Noi tutti, o signori, dobbiamo essere convinti essere necessario di serbare il nostro tempo e le nostre forze per le prossime e serie battaglie parlamentari che ci aspettano. Il volere ad ogni momento fare scaramucce coi propri avversari non è un segno di raccoglimento e di calma, ma bensì d'irritabilità soverchia, di agitazione incessante; non è indizio di forza, ma di debolezza¹⁹.

Conciliando la professione di docente-educatore con quella di deputato, Mantegazza condusse la sua carriera politica in perfetta continuità con l'*apostolato* educativo e la propaganda igienico-sanitaria di cui si era fatto promotore²⁰. A un anno soltanto dall'elezione in Parlamento, infatti, egli aveva iniziato a pubblicare, con cadenza annuale, gli *Almanacchi igienico-popolari*, attraverso i quali si propose di offrire agli italiani i rudimenti dell'educazione igienica, civica e morale²¹.

¹⁵ Mantegazza, *Ordine e libertà*, cit., p. 62.

¹⁶ Id., *Ricordi politici*, cit., p. 252.

¹⁷ *Ibid.*, p. 21.

¹⁸ *Ibid.*

¹⁹ Camera dei deputati, *Discussioni*, IX legislatura – Sessione 1865-1866, tornata del 18 dicembre 1865, p. 377.

²⁰ Si veda P. Mantegazza, *Almanacco igienico popolare. Piccola igiene domestica* (1880), Milano, Rara, 1991, p. 60.

²¹ Si veda M. Loconsole, *Popular education and hygiene propaganda: Paolo Mantegazza and the scientific pedagogy of his almanacs*, «Ricerche di pedagogia e didattica. Journal of theories and research in education», vol. 14, n. 1, 2019, pp. 45-71.

Il contatto diretto con le ipocrisie politiche e la delusione cui furono soggette alcune delle sue proposte alla Camera, trasformarono l'originaria diffidenza di Mantegazza verso la politica in vero e proprio disgusto. Disgusto che gli fece maturare un progressivo senso di inadeguatezza e che trovò la sua pubblica espressione nelle memorie politiche, poi pubblicate nel 1897. Circa le sue memorie, poi edite con il titolo *Ricordi politici di un fantaccino del Parlamento italiano*, è di estremo interesse il fatto che Mantegazza, quando era ancora impegnato con la stesura del volume, avesse pensato a cinque titoli differenti da assegnare al suo lavoro, ognuno dei quali faceva luce sulla sua condizione di disagio all'interno del Parlamento. Questi titoli erano: *Ricordi di un soldato semplice del Parlamento*; *Ricordi di un ex deputato brontolone, ma ottimista*; *Trent'anni di vita politica di un fantaccino del Parlamento*; *Ricordi e profezie di un ex deputato*; *La vita politica di un uomo non politico*²².

Al riguardo, nel *Secolo tartufo*, pubblicato 12 anni dopo la conclusione della sua attività di deputato, egli aveva dichiarato che «non nato a mentire», nella militanza in Parlamento si sentì «come un pesce fuor d'acqua o come una rondine sott'acqua»²³. Come ha raccontato il suo biografo Carlo Reynaudi, nel *Secolo tartufo* «le pagine dedicate alle ipocrisie politiche ci offrono opportunità di compierne il profilo scorrendone come uomo politico, aspetto poco noto alla maggior parte dei suoi ammiratori»²⁴.

Come Mantegazza avrebbe scritto nel 1897, la formazione dell'uomo politico presenta un paradosso la cui soluzione sarebbe da affidare «alla cabala o alla negromanzia».

Per diventar deputato, cioè legislatore, non occorrono cribri, né esami di sorta. Non si esige neppure la licenza tecnica. Non si deve essere analfabeti e basta. [...] Ma che cos'è un uomo politico? È un uomo, che può essere ignorante, ma anche disonesto: può aver letti pochi libri e forse nessuno, ma che può anche aver fallito dolosamente, tradito l'amico: che può anche essere incapace di dire da quali occulte sorgenti ricava i mezzi di sussistenza: ma che insomma è però un uomo politico²⁵.

Nel processo che condusse progressivamente Mantegazza a disgustarsi della vita politica, un ruolo centrale ricoprì il suo coinvolgimento nelle discussioni relative al *Regolamento Natoli* sulle facoltà medico-chirurgiche del Regno, approvato con regio decreto il 23 ottobre 1865 (n. 2584) e conseguente al

²² La lettera, inviata da Mantegazza a Giovanni Omboni, è contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 2222, 19 giugno 1895.

²³ P. Mantegazza, *Il secolo tartufo*, Milano, Treves, 1889, p. 143.

²⁴ C. Reynaudi, *Paolo Mantegazza e "Il secolo tartufo"*, «Fanfulla della domenica», vol. 10, n. 50, 9 dicembre 1888, p. 2.

²⁵ Mantegazza, *Ricordi politici*, cit., pp. 224-225.

regolamento emanato il 14 settembre 1862 dall'allora ministro di pubblica istruzione Carlo Matteucci²⁶.

Il *Regolamento*, attraverso il quale erano state selezionate e distinte, sulla base di un decreto ministeriale, le università governative e libere presso le quali poter condurre l'intero corso di studi in medicina e chirurgia, per i complessivi 6 anni, e quelle in cui seguire solo i primi quattro per poi specializzarsi in altre sedi (art. 15), aveva nei fatti sancito, come sostenne anche il deputato Carlo Morelli, una netta divisione della «parte teorica degli studi superiori dalla parte pratica»²⁷. Il *Regolamento*, che aveva causato l'insorgenza di proteste studentesche presso le università di Pavia, Bologna e Palermo, sarebbe poi stato all'origine, come aveva profetizzato Mantegazza, delle «più forti procelle» e di ribellioni studentesche anche in altri atenei del Regno. Secondo Mantegazza, il provvedimento, che aveva causato una vera e propria «mutilazione delle università», era quindi illegittimo²⁸.

Al di là delle discussioni intorno al *Regolamento* Natoli, abrogato il 29 agosto 1866 (D. R. n. 3192), ciò che è interessante rilevare è lo spirito che animò Mantegazza nel corso della sua prima interpellanza parlamentare. «Io credo – così si pronunciò alla Camera – che l'Università in Italia è una pianta robusta che ha le radici profonde nelle istituzioni, nella storia, nei bisogni del paese, e non ha bisogno che della mano coraggiosa d'un abile ministro che le tolga gli alberetti minori che fanno ombra»²⁹.

Formare la classe dirigente e educare all'autonomia la maggior parte degli italiani, si configuravano, almeno nelle intenzioni, come i principi fondativi della militanza di Mantegazza dentro e fuori le mura del Parlamento.

L'evento che più di ogni altro, però, alimentò l'avversione di Mantegazza verso il mondo politico-istituzionale, fu il fallimento dell'ordine del giorno da lui presentato il 2 giugno 1868, nell'interpellanza che mosse all'allora ministro di Pubblica istruzione e reggente del Ministero dell'agricoltura e del commercio Emilio Broglio.

Motivo ispiratore dell'intervento di Mantegazza fu l'abolizione delle tasse universitarie che, proposto quale regolamento da Carlo Matteucci, era divenuto legge nel 1862 (legge n. 719). Il provvedimento, sollecitato da frequenti sollevazioni studentesche in diverse città del Regno, era stato il segno, a detta di Mantegazza, di una cattiva gestione delle risorse finanziarie pubbliche. I tagli sull'istruzione universitaria, infatti, in un Paese in cui era stata votata la tassa

²⁶ Si veda Camera dei deputati, *Discussioni*, IX legislatura – Sessione 1865-1866, tornata del 28 febbraio 1866, p. 1124.

²⁷ Si veda Camera dei deputati, *Discussioni*, IX legislatura – Sessione 1865-1866, tornata del 1° marzo 1866, pp. 1135-1136.

²⁸ Si veda *ibid.*, p. 1135.

²⁹ *Ibid.*

sul macinato, erano «economie da cancelliere [...] fatte colla mollica del pane, non [...] sopra un piano elevato»³⁰.

Il rigetto dell'ordine del giorno di Mantegazza, che aveva proposto l'indizione di una inchiesta annuale per indagare sulle condizioni dell'istruzione e dell'insegnamento superiore in Italia al fine di tutelare tanto le finanze dei professori e degli assistenti quanto la preparazione degli studenti iscritti³¹, fu seguito dall'approvazione dell'ordine del giorno dell'onorevole Giuseppe Civinini che, estendendo il raggio della proposta mantegazziana, aveva richiesto una mozione sospensiva e l'estensione dell'inchiesta a tutti i gradi della formazione.

Gli interventi miranti a una rimodulazione e a una migliore gestione dell'istruzione pubblica, assieme all'investimento nel progresso tecnico-scientifico, all'avvio di un processo di civilizzazione e della stimolazione della religiosità individuale, intesa quale motore dell'agire morale, avrebbero dovuto costituire, secondo Mantegazza, i fondamenti per la costruzione della nuova identità nazionale, in un progetto utopico coordinato in prima linea dagli organi politico-istituzionali.

2. Educazione politica e patriottismo

Tutta l'esperienza politica di Mantegazza fu animata da un'idea ben precisa del rapporto tra scienza e politica: l'attività politica avrebbe dovuto rappresentare un semplice ma efficace strumento attraverso cui consentire il progresso della scienza che, a sua volta, si configurava quale *primum movens* del progresso umano e civile. Nella cultura positivista, infatti, la scienza, oltre che garante della salute, era divenuta un vero e proprio luogo di scoperta e promozione di valori eticamente vincolanti³².

L'apparente contraddizione insita nella militanza mantegazziana in Parlamento, in realtà, può essere sciolta tenendo presente che la sua partecipazione alla vita politica non servì ad altro che a far entrare, nel più ampio alveo istituzionale, temi che, dalla salvaguardia igienico-sanitaria alla generale opera di istruzione e educazione morale del popolo italiano, temeva potessero essere marginalizzati.

L'ideale mantegazziano di una rieducazione totale del popolo, quindi, rientrava in un più ampio progetto nazional-positivista. Tale progetto, che

³⁰ Camera dei deputati, *Discussioni*, X legislatura - Sessione 1867, tornata del 2 giugno 1868, p. 6399. Il regolamento del 1862 aveva decretato, oltre all'abolizione delle tasse, la decurtazione degli stipendi dei docenti, provocando sconvolgimenti generalizzati.

³¹ Si veda *ibid.*, p. 6405.

³² Si veda V.P. Babini, *L'infanticida tra letteratura medica e letteratura giuridica*, in P. Rossi (ed.), *L'età del positivismo*, Bologna, il Mulino, 1986, p. 473.

cronologicamente si avviò nella seconda metà dell'Ottocento e che prevedeva la lettura dei fenomeni sociali all'interno delle categorie prodotte dalla scienza, coincise con un processo di medicalizzazione del corpo umano e sociale. Pertanto, la diffusione dei principi della *nuova* scienza medico-igienica si fuse in un fortunato sodalizio con un impegno politico diretto, di cui i primi protagonisti furono i nuovi professionisti della scienza³³.

La cura e l'igiene della casa, microcosmo dell'apparato nazionale, l'educazione fisica e morale del singolo, la razionale gestione delle relazioni sociali e la protezione della nazione dagli individui cosiddetti devianti, avevano gradatamente legittimato l'ingerenza del medico-igienista e dell'educatore morale nella vita pubblica e privata degli italiani. Medico-igienista che, se attivo anche sul fronte politico, avrebbe potuto incidere con maggiore intensità nella rimodulazione dei costumi e delle abitudini degli italiani.

Sottoponendo qualsiasi aspetto della vita individuale e collettiva a un regime normativo volto alla formazione di un'identità nazionale coesa, gli scienziati politicamente impegnati si fecero promotori di un'educazione totale intesa quale disciplina dei corpi, delle menti e dell'apparato socio-nazionale³⁴. Furono questi i motivi per cui in Italia, un Paese ancora geograficamente, economicamente e culturalmente frammentato, l'educazione totale fu sottoposta a un principio di tipo nazionalista. L'idea di un miglioramento delle condizioni umane e sociali è parte, quindi, della più ampia riflessione mantegazziana, e si inserisce in un progetto di carattere utopico che, partendo dalla rieducazione del singolo, si sarebbe poi dovuto estendere alla dimensione sociale e al benessere nazionale.

Quello che ne *L'anno 3000*, un romanzo che Mantegazza stesso aveva definito «un libro politico e il più coraggioso e ardito che si va stampando da molti anni in qua»³⁵, è rappresentato come un mondo pan-scientifico e tecnologicamente avanzato, in cui la scienza e l'igiene hanno risolto gran parte dei problemi umani, si traduce, ne *Il bene ed il male*, nella rappresentazione di una società ideale, utopica appunto, in cui l'educazione morale, fondata sui principi formali della fede cristiana, avrebbe dovuto garantire, in un processo *in fieri*, uno stato di «pace perpetua».

Quello descritto da Mantegazza è un mondo migliore, in cui il governo si confronta, in maniera produttiva e positiva, con la libertà dei cittadini e con la loro autonomia. D'accordo con il socialismo nel denunciare le eccessive

³³ Si veda B. Fantini, *La storia delle epidemie, le politiche sanitarie e la sfida delle malattie emergenti*, «L'Idomeneo», n. 17, 2014, p. 16.

³⁴ Si veda G. Bonetta, *Corpo e nazione. L'educazione ginnastica, igienica e sessuale nell'Italia liberale*, Milano, FrancoAngeli, 1991, pp. 247-249. In tema di divulgazione pedagogica, si veda G. Chiosso, *Libri di scuola e mercato editoriale. Dal primo Ottocento alla riforma Gentile*, Milano, FrancoAngeli, 2016.

³⁵ Si tratta di una lettera inviata da Mantegazza a Giovanni Omboni, contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 2310, 28 marzo 1897.

disuguaglianze economiche fu, però, contrario a qualsivoglia riforma che prevedesse la totale omologazione delle diversità sociali³⁶. Ciò di cui, invece, propose un'omologazione, fu, in una prospettiva per certi aspetti kantiana, l'educazione morale dell'individuo quale garanzia per il benessere della società tutta.

L'idea a partire dalla quale si dipana l'argomentazione di Mantegazza è quella secondo cui, essendo la coscienza un elemento comune a tutti gli esseri umani, è in essa a essere inscritta la differenza tra il bene e il male. L'azione moralmente buona, dunque, è esattamente l'effetto di ciò che questa coscienza universale imporrebbe a chiunque di fare³⁷. Se ciò è valido in rapporto all'agire individuale, da un punto di vista politico lo Stato ha il dovere di garantire al cittadino la libertà che è «il fondamento della nostra dignità»³⁸.

Il movente dell'azione moralmente e socialmente buona, secondo Mantegazza, non deve consistere nell'altrui approvazione quanto, piuttosto, nella gratificazione che la coscienza di ciascuno proverà nella consapevolezza di aver fatto il bene. Al contempo, il deterrente a fare il male sarà, al di là della paura del legittimo sistema penale, un intimo senso di colpa, provato quale conseguenza diretta dell'azione immorale. Vicino al pensiero di Kant per ciò che concerne l'idea di una morale universale, sebbene il filosofo tedesco avesse indicato una distinzione tra vita morale e vita legale³⁹, e distante per ciò che attiene al movente dell'azione moralmente buona, l'amor proprio in Mantegazza e il rispetto della legge morale in Kant, la proposta mantegazziana sembra meglio aderire a quella arendtiana: l'azione buona è quella prodotta da una maturata capacità di giudizio⁴⁰.

³⁶ Si vedano Mantegazza, *Ordine e libertà*, cit., p. 92; C. De Boni, *Utopia e positivismo: il caso italiano di Paolo Mantegazza*, «Morus», vol. 4, 2007, pp. 137-148. Sul tema, estremamente interessante è il contributo di Gianluca Scroccu che, tenendo conto tanto delle trasformazioni politiche quanto dei mutamenti apportati dall'approccio positivista in ambito scientifico, rileva in Paolo Mantegazza uno scienziato sociale nell'accezione più ampia del termine. Quello che presenta, infatti, è un Mantegazza divulgatore che, a partire da un'educazione igienico-sanitaria, individuale e collettiva, impartita con tutti i mezzi di comunicazione allora disponibili, è consapevole di poter contribuire, per mezzo dell'impegno politico e scientifico, alla sana formazione del neonato popolo italiano. Si veda G. Scroccu, *Nazionalizzazione, scienza e socialismo: Mantegazza e l'antropologia dell'italiano dopo l'Unità*, in Atzei, Orlandini Carcreff, Manca (edd.), *Paolo Mantegazza*, cit., pp. 159-167.

³⁷ Si veda P. Mantegazza, *Il bene ed il male. Libro per tutti* (1861), Sesto S. Giovanni, Madella, 1912, p. 12.

³⁸ *Ibid.*, p. 15.

³⁹ La prima consistente nell'agire nel rispetto della legge morale in sé, la seconda nell'agire in modo semplicemente conforme alla legge ma senza alcuno zelo.

⁴⁰ Il riferimento è al discorso tenuto da Hannah Arendt il 18 aprile 1975, in occasione del conferimento del Premio Sonning in Danimarca: H. Arendt, *Prologo*, in Ead., *Responsabilità e giudizio*, a cura di J. Kohn, Torino, Einaudi, 2004, pp. 3-12 e al saggio del 1971 intitolato *Il pensiero e le considerazioni morali*, in *ibid.*, pp. 137-163. Si veda anche Ead., *La banalità del male. Eichmann a Gerusalemme*, Milano, Feltrinelli, 2013.

A partire dal presupposto secondo cui «se tutti gli uomini fossero morali [...] nessuno sarebbe infelice»⁴¹, Mantegazza, procedendo con l'analogia tra famiglia/società/Stato, enucleava così il suo fervido patriottismo.

Il suolo che vi ha veduto nascere [...] quella terra a cui vi legano le memorie del passato, le gioie del presente e le speranze dell'avvenire; l'alveare di cento e mille famiglie, strette le une accanto alle altre, che, nate insieme, hanno ereditato lo stesso patrimonio di glorie comuni [...] tutto questo cumulo di tesori e di affetti, non forma che una cosa sola [...] la *patria*. [...] che dobbiamo amare e adorare come padre, come madre, come amica nostra, come cosa amata sopra tutte le cose care, sane e divine⁴².

Un patriottismo, quello di Mantegazza, che emerge, più o meno velatamente, in molteplici circostanze.

La convinzione che la rigenerazione sociale e nazionale dovesse necessariamente passare attraverso l'educazione totale e interventi amministrativo-istituzionali volti al miglioramento delle condizioni igienico-sanitarie del Paese, determinò, ad esempio, il coinvolgimento di Mantegazza nelle discussioni sulla redazione del nuovo codice sanitario, dopo le esperienze fallimentari del progetto Lanza (1873) e Nicotera (1876)⁴³. Ormai senatore, già membro del Consiglio superiore di sanità dal 1871 e presidente della Società Italiana di igiene dal 1882, Mantegazza intervenne su tale questione in Senato.

Contrario all'affidamento dell'*interim* igienico-sanitario al ministro dell'Interno Giovanni Nicotera, Mantegazza propose l'istituzione di una Direzione generale di sanità da affidare a personale tecnico competente⁴⁴. Direzione che sarà poi fondata, nel giugno 1877, dall'allora ministro dell'Interno Francesco Crispi, e che sarà affidata alla direzione di Luigi Pagliani a cui «l'Italia redenta dal sudiciume dell'ignoranza igienica per opera vostra vi preparerà una corona [...] di fiori e di alloro»⁴⁵.

Ritenendo che il risanamento delle condizioni igienico-sanitarie del Paese costituisse un elemento essenziale per la formazione di un popolo sano, Mantegazza partecipò attivamente, in Senato, anche alle discussioni relative alla fondazione della Scuola di perfezionamento d'igiene in Roma. Scuola la cui fondazione, conseguente all'approvazione del regolamento sottoscritto da Francesco Crispi e dal ministro della Pubblica istruzione Paolo Boselli (31 luglio 1888), fu affidata alla direzione di Luigi Pagliani, e alla quale era demandata la

⁴¹ Mantegazza, *Il bene ed il male*, cit., p. 33.

⁴² *Ibid.*, pp. 83-84.

⁴³ Si veda F. Della Peruta, *Sanità pubblica e legislazione sanitaria dall'Unità a Crispi*, «Studi storici», vol. 21, n. 4, 1980, pp. 713-759.

⁴⁴ Si veda Senato del Regno, *Discussioni*, XIII legislatura – Sessione 1876-1877, tornata del 6 dicembre 1877, p. 1936.

⁴⁵ P. Mantegazza, *Almanacco igienico popolare*, Milano, Dumolard, 1891, p. 5.

funzione di formare personale medico specializzato da destinarsi alla gestione della sanità pubblica⁴⁶.

Se sul piano dell'attivismo politico-istituzionale Mantegazza s'impegnò nella ricostruzione dell'identità nazionale a partire da interventi di carattere igienico-sanitario, su un piano più specificamente divulgativo egli illustrò agli italiani il valore del lavoro quale strumento di civilizzazione e coesione nazionale.

Il lavoro, di qualsiasi natura esso sia, che è ciò che responsabilizza l'individuo in società rendendolo meritevole delle sue ricchezze, consentendogli di godere delle «sante gioie della famiglia» e di «costruirsi il suo nido»⁴⁷, si configura come uno fra i principali strumenti di civiltà che stimola il senso di appartenenza a quella grande famiglia che è la nazione. Lanciando il suo anatema contro il parassitismo sociale e ritenendo indispensabile un'azione che, partendo dalle alte cariche istituzionali, miri a una più equa redistribuzione delle ricchezze e alla tutela e alla prevenzione igienica di qualsivoglia classe lavoratrice⁴⁸, Mantegazza scrive:

la *società umana* diverrà una *famiglia umana* quando ogni uomo sarà un operaio; quando le ricchezze e le disuguaglianze fra gli uomini saranno attagliate alla misura del lavoro; quando non vi sarà alcuna grandezza, alcuna fortuna che non sia figlia di fatica⁴⁹.

Bisogna dunque perfezionarsi, essere anche pronti alla chiamata alle armi per la difesa del Paese, «onde essere sempre più utili alla famiglia a cui appartenete, e alla patria che vi conta fra i suoi cittadini»⁵⁰.

Condizione necessaria per essere buoni cittadini è, inoltre, avere contezza delle norme che regolano il vivere civile, nonché coscienza dell'ordinamento e della situazione politica vigenti. E questo è il tema affrontato in *Ordine e libertà*, un piccolo trattato di educazione civica e politica che Mantegazza pubblicò nel 1864, rivolgendosi al popolo italiano nella sua interezza, giacché, come scrisse ne *Il secolo nevrosico*: «Io non voglio l'ignoranza del proletario [...] Io voglio l'operaio istruito, conscio dei suoi diritti e dei suoi doveri»⁵¹.

Scritto con l'intento di istruire su ciò che «è vergognoso non sapere, e peggio ancora saper male»⁵², Mantegazza riteneva che parlare di politica, ossia

⁴⁶ Si veda Senato del Regno, *Discussioni*, XVI legislatura – Sessione 1889, tornata del 4 aprile 1889, pp. 263-278.

⁴⁷ P. Mantegazza, *Le glorie e le gioie del lavoro* (1870), Milano, Maisner, 1871, p. 42. Su questi temi, e in particolare sul ruolo riconosciuto da Mantegazza al lavoro quale strumento di emancipazione individuale prima ancora che di ascesa sociale, si veda R. Sani, *The 'emulators' of Samuel Smiles: Self-Help literature in Italy during the 19th Century*, «History of Education & Children's Literature», vol. XIII, n. 2, 2018, pp. 59-62.

⁴⁸ Si veda P. Mantegazza, *Almanacco igienico popolare. Igiene del lavoro*, Milano, Brigola, 1881, pp. 12-18.

⁴⁹ Id., *Le glorie e le gioie del lavoro*, cit., p. 118.

⁵⁰ Id., *Il bene ed il male*, cit., pp. 88, 108.

⁵¹ Id., *Il secolo nevrosico* (1887), Pordenone, Edizioni Studio Tesi, 1995, p. 93.

⁵² Id., *Ordine e libertà*, cit., pp. 13-24.

dell'arte di governare la società, avesse un senso solo laddove fosse garantita la libertà. Attraverso una sovrapposizione tra il piano morale e quello legale, che gli faceva vedere nella politica la «morale allargata» che poggia «sui principi del bene e del male», riprendeva quanto scritto nel suo galateo: prima ancora che per effetto della legge positiva, i principi dell'azione giusta e dell'ingiusta, come quelli della buona e della cattiva, sono noti a tutti in virtù di una “coscienza legale” universale. «L'uomo è uno solo e la sua morale deve essere una sola [...] L'uomo onesto è onesto sempre e dappertutto»⁵³. Cosicché, «se tutti [...] fossero onesti, tutti sarebbero liberi, perché nessuno soffrirebbe minaccia di violenze o di soprusi»⁵⁴. Poiché, però, il piano dell'essere non coincide con quello del dover essere, è necessario che si garantiscano, attraverso la politica, le leggi, al fine di tutelare la libertà individuale da eventuali minacce.

Il corretto esercizio della libertà, e quindi la scelta consapevole di agire secondo il bene collettivo prima ancora che individuale, avrebbe consentito di salvaguardare e mantenere l'ordine che, a sua volta, è condizione necessaria della perfetta società⁵⁵.

Istruendo il popolo circa le competenze delle alte cariche istituzionali (Parlamento, Guardia nazionale etc.) e la struttura del *corpus* sociale, Mantegazza dispensava anche consigli agli elettori del Regno, suggerendo loro di votare gli eventuali futuri rappresentanti dello Stato secondo il principio della prudenza.

Molti ambiziosi lusingano le passioni degli individui, le vanità municipali; poi, raggiunto il potere, dimenticano tutto e tutti [...]. Né vi ingannate nel vostro voto dell'eloquenza del vostro deputato. Vi sono eccellenti deputati che non parlarono mai [...] e vi sono e vi saranno parlatori famosi che non fecero nulla per il loro paese⁵⁶.

Come aveva confessato a Omboni, in riferimento all'esperienza politica del 1868, «sono più scoraggiato, più scoraggiato che mai, scoraggiatissimo della vita politica [...] nel mio calamaio ho molte idee da mettere in carta, mi duole assai masturbarmi il cervello sempre per amore della patria e di me stesso»⁵⁷. E ancora, se nel 1881 aveva scritto che «gli *imbrogli* son tutti *uomini politici*, gli *intriganti*, *uomini di Stato*»⁵⁸, nel 1896, Mantegazza, in un telegramma di scuse inviato e letto in Senato dall'allora presidente Domenico Farini, chiari così la sua posizione sul disgusto per la politica: «il mio schifo, Dio me ne guardi, non è per il Senato [...] né per la Camera [...] il mio schifo è per la politica, cioè

⁵³ Id., *Le glorie e le gioie del lavoro*, cit., p. 44.

⁵⁴ Id., *Ordine e libertà*, cit., p. 22.

⁵⁵ Si veda *ibid.*, p. 31.

⁵⁶ *Ibid.*, p. 67.

⁵⁷ Lettera di Mantegazza a Giovanni Omboni, contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 519, 17 gennaio 1868.

⁵⁸ Mantegazza, *Almanacco igienico popolare. Igiene del lavoro*, cit., p. 52.

per l'ambiente collettivo di tutte le energie, di tutti i sentimenti, di tutto il bene, di tutto il male che costituiscono l'ambiente di un popolo»⁵⁹.

3. Paolo Mantegazza: un laico religioso

Elemento comune che emerge dallo studio dei testi politici di Mantegazza è il diverso rapporto da lui intrattenuto da un lato con la «religione del cuore» e, dall'altro, con la «religione istituzionalizzata». Nella sua riflessione, infatti, Mantegazza distingueva tra un piano istituzionale-normativo, ossia quello degli enti cattolici, e un piano più intimistico, quello della fede cristiana. Non è un caso che, in una confessione al suo migliore amico Giovanni Omboni, Mantegazza avesse dichiarato che mai si sarebbe convertito alla fede cattolica ma che, al contrario, se gli si fosse proposto di convertirsi alla fede cristiana «quasi quasi mi lascerei convincere e mi farei minuto e umile catecumeno [...] ma son troppo vecchio e troppo indurito nelle vie del male. Prima però vorrei sentirmi trasformato l'anima»⁶⁰.

Sul piano politico, già nell'indirizzo in risposta al discorso della Corona fu ribadita, alla Camera, la necessità di ridefinire i rapporti tra Chiesa e Stato⁶¹ e procedere affinché i rappresentanti della nazione deliberassero «intorno all'abolizione delle corporazioni religiose»⁶², poi sopprese il 7 luglio 1866 (D. R. n. 3036).

Come per il suo rapporto con l'agone politico, anche il contatto con la Chiesa istituzionale rappresentò la triste radice autobiografica del crescente disprezzo di Mantegazza verso l'ingerente presenza della Chiesa in questioni estranee alla sua pertinenza.

Si tenga presente che, nel progetto mantegazziano di riforma dell'identità nazionale era contemplata anche la sfera della sessualità. Pertanto, al fine di consentire la formazione di una popolazione sana oltre che moralmente educata, gran parte della produzione di Mantegazza fu connotata dagli elementi di una vera e propria campagna di pedagogia sessuale: la salvaguardia della salute individuale e collettiva, infatti, doveva avere inizio proprio dalla corretta gestione della vita sessuale, attraverso la quale le italiane e gli italiani

⁵⁹ Senato del Regno, *Discussioni*, XIX legislatura – Sessione unica 1895-1897, tornata del 7 luglio 1896, p. 2521.

⁶⁰ La lettera di Mantegazza a Omboni è contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 798, 14 gennaio 1877.

⁶¹ Al riguardo, si veda S. Marotta, *L'evoluzione del dibattito sul «Non expedit» all'interno della curia romana tra il 1860 e il 1889*, «Rivista di storia della Chiesa in Italia», n. 1, 2004, pp. 95-164.

⁶² Camera dei deputati, *Discussioni*, IX legislatura – Sessione 1865-1866, tornata del 15 dicembre 1865, p. 358.

si sarebbero resi responsabili della generazione di una prole, e dunque di una popolazione, sana⁶³.

Il «Senatore erotico»⁶⁴, che aveva osato popolarizzare i precetti di una scienza igienica preventiva in materia di sessualità⁶⁵ e che aveva proclamato «i vantaggi della castità»⁶⁶, fu oggetto di numerose condanne, di provenienza cattolica, per oltraggio al pudore.

Le opere di Mantegazza a essere condannate furono gli *Elementi d'igiene* (1864), la *Fisiologia dell'amore* (1872), l'*Igiene dell'amore* (1877) *Gli amori degli uomini* (1886), la *Fisiologia del dolore* (1880), la *Fisiologia dell'odio* (1889), *Epicuro. Saggio di una fisiologia del bello* (1891), il *Dizionario delle cose belle. Epicuro 2* (1892), *L'arte di prender moglie* (1892), la *Fisiologia della donna* (1893) e *L'arte di prender marito* (1894)⁶⁷. In virtù della morale sessuofobica vigente, la Chiesa aveva individuato in Mantegazza un ostacolo al perpetuarsi dei consolidatisi costumi sessuali, accusandolo di essere un autore pornografico⁶⁸.

E proprio alla Camera, il deputato cattolico Cesare Cantù, nel condannare l'orientamento della nuova scienza materialista che aveva fatto discendere gli umani dalle scimmie, scagliò una velata ma pubblica condanna contro gli *Elementi d'igiene*, in cui Mantegazza si era fatto promotore del precetto neomalthusiano *anti-biblico* «amate ma non generate»⁶⁹.

Se, però, in seno al mondo cattolico era per lo più condivisa l'idea che la produzione mantegazziana fosse immorale, è interessante rilevare come tale posizione non fosse unanimemente condivisa dall'opinione pubblica italiana. Interessante, al riguardo, è una lettera che una lettrice, tale Enrichetta Dentis Pezzi, inviò a Mantegazza in relazione a *Il bene ed il male*: un galateo che, costruito sulla base delle più profonde prescrizioni del messaggio evangelico⁷⁰, muoveva dall'idea che «la fede è alla base della religione e della morale»⁷¹. «Questo libro

⁶³ Si rimanda a M. Loconsole, *Storia della contraccezione in Italia tra falsi moralisti, scienziati e sessisti*, Bologna, Pendragon, 2017; P. Sorcinelli, *Per non fare figli*, in Id., *Dieci storie nel comò*, Milano, Mondadori, 2011, pp. 171-193.

⁶⁴ L'espressione è di G. Papini, *Il senatore erotico*, in Id., *Passato remoto, 1885-1914*, Firenze, L'Arco, 1948, p. 11.

⁶⁵ Sulla divulgazione in materia di educazione sessuale si veda, in particolare, P. Mantegazza, *Almanacco igienico popolare. Igiene del nido*, Milano, Brigola, 1877.

⁶⁶ Id., *Igiene dell'amore* (1877), Firenze, Bemporad e figlio, 1930, p. 5.

⁶⁷ Si veda T. Dell'Era, «Questo ipocrita seguace dell'epicureismo»: Mantegazza all'Indice, in Atzei, Orlandini Carcreff, Manca (edd.), *Paolo Mantegazza*, cit., pp. 23-40.

⁶⁸ Su questi temi, si rimanda a M. Boni, *L'erotico senatore. Vita e studi di Paolo Mantegazza*, Fiesole, Name, 2002; L. Nay, «Nell'arte il bello, nella scienza il vero». *Alla ricerca della verecondia*, «SpazioFilosofico», vol. 2, 2012, pp. 285-295.

⁶⁹ Camera dei deputati, *Discussioni*, IX legislatura, Sessione 1865 – 1866, tornata del 21 aprile 1866, pp. 1781-1788.

⁷⁰ Si veda L. Tasca, *Galatei. Buone maniere e cultura borghese nell'Italia dell'Ottocento*, Firenze, Le Lettere, 2004, pp. 110-112.

⁷¹ Mantegazza, *Il bene ed il male*, cit., p. 47.

poi – si legge nella lettera – che fa della S. V. Illustr.ma un Apostolo, basta da sé a smentire la falsa opinione di certuni che non conoscendola le negano la divisa di perfetto cristiano». Il galateo del 1861 finì quindi per rappresentare «un'arma, con cui combattere sì erronea opinione»⁷².

Se i tormentati rapporti di Mantegazza con la censura cattolica erano serviti a risvegliare e fomentare il suo originario disprezzo verso l'istituzione cattolica, alla Camera fu una soltanto l'occasione in cui ebbe modo di esprimere pubblicamente la sua riprovazione.

In particolare, il tentativo di limitare l'ingerenza della Chiesa nell'istruzione e nell'educazione del popolo italiano si configurò quale strumento attraverso cui ratificare la separazione delle competenze spirituali da quelli temporali.

Al riguardo, nel passaggio dalla legge Boncompagni del 1848, alla legge Casati del 1859, e fino alla legge Coppino del 1877, era emersa, con sempre maggiore prepotenza, la volontà di ridimensionare l'interferente presenza della Chiesa Romana⁷³, ente morale ma nei fatti dalla grande incidenza politica, nella formazione delle nuove generazioni⁷⁴.

Secondo i principi esposti nel libello del 1864, proibire qualsivoglia professione di fede avrebbe significato violare la libertà individuale e impedire il libero espletarsi della propria individualità, nonché troncare alla radice il significato stesso della politica⁷⁵.

Al centro della religione propugnata da Mantegazza, vi era una fede che «non appartiene alla scienza ma ad un altro mondo, che è nel mio cuore o nel mio cervello»⁷⁶. Più che di una religione positiva in sé e per sé, Mantegazza parlava di una fede che, fungendo da motore propulsivo dell'azione moralmente e legalmente buona, diviene uno strumento di coesione culturale e sociale.

⁷² La lettera di E. Dentis Pezzi a Mantegazza è contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 868, luglio 1878.

⁷³ Sul rapporto tra Stato e Chiesa in relazione alle politiche scolastiche e educative, si vedano R. Sani, *Stato, Chiesa e scuola dal 1861 al 1870*, in Id., *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, pp. 299-344; Id., *Chiesa e prospettive educative in Italia dopo la Restaurazione: le suggestioni di un convegno*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. 1, 1994, pp. 265-276; F. De Giorgi, *Le congregazioni religiose dell'Ottocento e il problema dell'educazione nel processo di modernizzazione in Italia*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. 1, 1994, pp. 169-206; Id., *Le congregazioni religiose dell'Ottocento nei processi di modernizzazione delle strutture statali*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e unificazione*, Brescia, La Scuola, 1994, pp. 123-150.

⁷⁴ In merito alla legge Casati e alla laicizzazione dell'istruzione e dell'educazione, si vedano C. Covato, A.M. Sorge, *L'istruzione normale dalla legge Casati all'età giolittiana*, Roma, Ministero per i beni culturali e ambientali. Ufficio centrale per i beni archivistici, 1994, pp. 41 ss.; S. Polenghi, *La politica universitaria italiana nell'età della Destra storica 1848-1876*, Brescia, La Scuola, 1993, pp. 57-90; S. Santamaita, *Storia della scuola*, Milano-Torino, Mondadori, 2010, pp. 9-40.

⁷⁵ Si veda Mantegazza, *Il bene ed il male*, cit., p. 132.

⁷⁶ Id., *Il Dio ignoto*, Milano, Brigola, 1877, p. 18.

Non a caso, nel 1873 Mantegazza aveva comunicato a Omboni che il suo *Dio ignoto*, ancora in fase di stesura, «è un libro in cui si dimostrerà [...] che ogni uomo (anche l'ateo) abbia un Dio, e che tutti gli dei di ciascheduno sommati insieme formano l'ideale»⁷⁷. Non si trattava, quindi, di una fede di natura intimistica, giacché, come scrisse nell'almanacco del 1874: «anche il gusto di Domeneddio di aver fatto un mondo così bislacco come il nostro *non est disputandum*, perché, disputando, vi sarebbe da fargli un processo per cattivo gusto»⁷⁸.

Come si legge nella prefazione alla seconda edizione de *Il bene ed il male* (1868): «l'autore avrebbe ben volentieri ubbidito al desiderio di alcuni critici, i quali avrebbero voluto una morale più larga e forse meno strettamente collegata alle dottrine religiose ma [...] è rimasto nella sua antica idea che, scrivendo per il popolo, si debba fare a questo modo»⁷⁹. Il sentimento religioso, il ricorso costante al quale si rivela un espediente comunicativo funzionale al più esteso coinvolgimento popolare possibile, rappresentava di per sé un valore patriottico dal *potere* unificante.

Ciononostante, l'esaltazione del valore della religiosità non è in contraddizione con il feroce anticlericalismo che contraddistinse l'attività politica e la produzione mantegazziana.

Nell'interpellanza parlamentare del 20 aprile 1866, il deputato di sinistra Giuseppe Civinini, ex patriota e feroce militante nella battaglia contro la Chiesa romana, aveva proposto alla Camera che si procedesse, in osservanza del decreto legge del 10 febbraio 1861, all'ispezione dei seminari religiosi (art. 17). Questi, infatti, visti come luoghi di corruzione dei costumi, avevano travalicato i limiti imposti dalla loro precipua funzione, la formazione ecclesiastica, facendosi anche carico dell'istruzione e dell'educazione delle nuove generazioni⁸⁰.

Al riguardo, la legge del 1861, con cui era stata decretata l'ispezione di tutti gli istituti d'istruzione, ivi compresi i seminari (art. 57), trovò la sua concreta attuazione solo a partire dalla primavera del 1865 dopo che, in un primo momento, nell'ottobre del 1864, furono disattesi i provvedimenti contenuti nelle circolari ministeriali inizialmente rivolti ai seminari delle province napoletane e umbro-marchigiane⁸¹.

⁷⁷ La lettera di Mantegazza a Omboni è contenuta in «Archivio cartaceo del Museo di Antropologia. Università degli studi di Firenze», Fondo Mantegazza, inv. 630, 1° gennaio 1873.

⁷⁸ P. Mantegazza, *Igiene dei sensi*, Milano, Brigola, 1874, p. 30.

⁷⁹ Id., *Il bene ed il male*, cit., p. 8.

⁸⁰ Si veda C. Sagliocco, *L'Italia in seminario. 1861-1907*, Roma, Carocci, 2008, pp. 66 ss. Sul rapporto tra educazione laica e religiosa e relativamente all'insorgenza del mondo clericale contro il monopolio statale dell'istruzione, si veda G. Piovano, *La libertà della scuola in Italia dallo Statuto in qua*, «Rivista internazionale di scienze sociali e discipline ausiliarie», vol. 65, n. 258, 1914, pp. 164-189.

⁸¹ Si vedano i D.R. n. 209 del 17 febbraio 1861, *Vigilanza sull'insegnamento delle scuole, dei collegi e dei seminari delle province napoletane* e il n. 4604 del 20 gennaio 1861, *Obbligo per i seminari e collegi vescovili delle Marche e dell'Umbria di uniformarsi alle disposizioni vigenti per*

L'azione di vigilanza, infatti, rappresentava, per molti vescovi, una violazione dei diritti degli enti religiosi, i quali non sarebbero dovuti rientrare nel regime di regolamentazione e sorveglianza governative. Ciò che qui interessa rilevare è che fu proprio la commistione tra caratterizzazione laica e religiosa, e quindi il carattere misto dei seminari, a far cadere le resistenze vescovili⁸².

L'interpellanza mossa da Civinini, di poco precedente alla soppressione delle corporazioni religiose (7 luglio 1866), era il seguito di quel decreto regio (n. 2506 del 1° settembre 1865) con cui Vittorio Emanuele II, con la sottoscrizione di Natoli e dell'allora ministro di Grazia e giustizia Paolo Cortese, aveva decretato la riapertura delle scuole secondarie annesse ai seminari, al fine di tutelare l'istruzione dei giovani tanto chierici quanto laici (art. 1). Sebbene l'ispezione del 1865 avesse condotto, il 10 novembre dello stesso anno, alla chiusura di ben 82 seminari sui 263 totali presenti sul territorio italiano, Civinini chiedeva che questa «scabbia», questa piaga sociale, venisse del tutto estirpata⁸³.

L'educazione e l'istruzione offerte nei seminari non danno alla nazione «né buoni costumi, né scienza vera e sincera». E, continuava Civinini, «mentre dunque la setta clericale [...] ci fa la più aspra e disperata guerra; noi affidiamo parte della nostra gioventù ai preti, i quali ne contaminano l'anima e il corpo nei loro seminari»⁸⁴.

Civinini, dunque, invocava la necessità di «prendere un rimedio radicale ed assoluto» anche perché i seminari, e le «scuole d'ignoranza» a essi annesse, oltre a corrompere, impartiscono un'istruzione antiquata e tutta orientata alla propagazione della dottrina cattolica, soprattutto per quanto attiene all'insegnamento della filosofia⁸⁵.

L'interpellanza di Civinini era rivolta contro Domenico Berti che, condannando e volendo limitare gli eccessi laicisti di Giuseppe Natoli, decise di riaprire quei seminari che non si erano sottratti alla visita ispettiva del 1865. In questo modo, però, come sostenne l'onorevole Filippo De Boni, si sarebbe venuti meno al principio di separazione tra Stato e Chiesa e ripristinato il sistema degli ibridi istituti laico-ecclesiastici⁸⁶.

gli istituti d'istruzione pubblica.

⁸² Si veda M. Casella, *Alla scoperta della religiosità nell'Italia meridionale. La diocesi di Diano-Tegghiano tra '800 e '900*, Soveria Mannelli, Rubbettino, 2005, pp. 115-123.

⁸³ Sul tema, si veda S. Soldani, *Un vivaio di cittadini consapevoli? Appunti sul ginnasio-liceo negli anni della fondazione dello Stato nazionale italiano (1860-1870)*, in C.G. Lacaita, M. Fugazza (edd.), *L'istruzione secondaria nell'Italia unita. 1861-1901*, Milano, FrancoAngeli, 2013, pp. 31-64.

⁸⁴ Camera dei deputati, *Discussioni*, IX legislatura, Sessione 1865 – 1866, tornata del 20 aprile 1866, pp. 1759-1760. Sul tema dell'istruzione impartita in seminario e sulla condizione di separatezza che vigea tra mondo laico e ecclesiastico, si veda l'interessante rassegna bibliografica di M. Lupi, *Clero italiano e cura pastorale in età contemporanea. Fonti e dibattito storiografico*, «Rivista di storia della chiesa in Italia», vol. 60, n. 1, 2006, pp. 69-89.

⁸⁵ Si veda Camera dei deputati, *Discussioni*, IX legislatura, tornata del 20 aprile 1866, p. 1761.

⁸⁶ Si veda *ibid.*, p. 1764.

A difendere Berti intervennero i deputati Vito D'Ondes Reggio e Cesare Cantù che, difensori della causa cattolica nel corso degli anni '60 dell'Ottocento, si dimisero poi nel 1870 a seguito della Breccia di Porta Pia⁸⁷.

Proprio Mantegazza, che pur aveva stimato l'operato di Berti per ciò che concerne il miglioramento delle condizioni dell'istruzione primaria e secondaria⁸⁸, si presentò a Berti, un ministro che faceva grande paura «per il suo troppo amore coi frati e coi preti», come un «grande seccatore»⁸⁹, che sarebbe sempre stato alle «sue costole»⁹⁰.

L'argomentazione difensiva avanzata dall'avvocato D'Ondes Reggio si fondava sull'idea che gli stessi colleghi governativi si facessero fautori di insegnamenti corruttori. E da qui all'interrogativo: «qual è l'insegnamento che si deve dare, quello che dite voi o quello che dico io?»⁹¹.

Tornando a Mantegazza, due furono gli interventi che più di tutti, nel corso della medesima seduta, lo indussero a prendere la parola. In prima battuta, quello dell'onorevole Filippo De Boni, il quale concluse il suo intervento chiedendo che i seminari fossero «abbandonati dal potere civile»⁹² e, in secondo luogo, quello del deputato Giorgio Asproni che, nel rivendicare «libertà alla Chiesa ed al secolo», riconosceva l'infondatezza dell'insegnamento di uno specifico catechismo all'interno delle scuole pubbliche, causa l'inevitabile indottrinamento⁹³.

L'intervento di Mantegazza contro Berti partiva dal caso del seminario dei Barnabiti di Monza i quali, all'indomani della seconda elezione di Mantegazza alla Camera, avevano avanzato la proposta, rivelatasi poi fallimentare, di eleggere, al posto di Mantegazza, il moderato e filocattolico Villa Pernice. Alla seconda candidatura seguì quella del 13 novembre 1870, che Mantegazza avanzò solo perché, nello stesso anno, con la breccia di Porta Pia era entrata «nella secolare fortezza dell'oscurantismo la luce del pensiero portata da armi italiane»⁹⁴.

Nel corso della seduta, Mantegazza ricordava ai suoi colleghi deputati che nel seminario dei Barnabiti, difeso da Berti⁹⁵, ci sono pochi monzesi proprio perché essi li conoscono e sanno bene che «cospirano continuamente contro

⁸⁷ Si veda Marotta, *L'evoluzione del dibattito sul «Non expedit»*, cit., p. 102.

⁸⁸ Sul problema dell'analfabetismo e sulla relativa questione dell'alfabetizzazione in Italia, si veda G. Vigo, *Gli italiani alla conquista dell'alfabeto*, in Soldani, Turi (edd.), *Fare gli italiani*, cit., pp. 37-66.

⁸⁹ Il testo è tratto dalla lettera che Mantegazza inviò a Berti, contenuta presso il «Museo del Risorgimento di Torino», Fondo Domenico Berti, cartella 50/225, 9 febbraio 1866.

⁹⁰ Lettera di Mantegazza a Berti, *ibid.*, cartella 50/226, 23 febbraio 1866.

⁹¹ Camera dei deputati, *Discussioni*, tornata del 20 aprile 1866, cit., p. 1763.

⁹² *Ibid.*, p. 1765.

⁹³ Si veda *ibid.*, p. 1773.

⁹⁴ Mantegazza, *Ricordi politici*, cit., p. 157.

⁹⁵ Si veda *ibid.*, pp. 69-73.

la vera civiltà»⁹⁶. Contrario all'indottrinamento coatto da loro esercitato e persuaso che i grandi umanisti furono tutti coloro che si opposero a Roma⁹⁷, colmò, nel suo discorso, la distanza tra il deputato e il promotore dell'unità, della cultura e dell'identità nazionali.

Nel suo intervento, Mantegazza, in continuità con il discorso pronunciato da Domenico Berti, secondo il quale il sentimento religioso non può «nuocere alla scienza»⁹⁸, aveva sostenuto che «il sentimento religioso è un forte strumento di civiltà che educa, che non è opera della scienza, ma che quando va d'accordo colle istituzioni libere del paese, è il più prezioso educatore»⁹⁹. Contrario all'ingerenza della Chiesa istituzionale ma favorevole alla stimolazione del sentimento religioso degli italiani, Mantegazza scrisse:

Io non ho mai combattuto la religione, che credo una delle più alte idealità del pensiero, e soprattutto uno dei più cari conforti nei travagli della vita; ma a viso aperto, e dalla cattedra e dai libri, ho gettato l'anatema all'industria, alla simonia del cielo; a tutte le forme ipocrite del misticismo, che adoperano il sentimento religioso come *instrumentum imperii* o come sorgente di lucro. Ho sempre rispettato il tempio, ho sempre derisa la sagrestia; ho abbassato il capo all'altare, ho sempre guardato con alto disprezzo la bottega¹⁰⁰.

Pertanto, con il fine di contribuire alla formazione di una solida e coesa identità nazionale, fatta di italiani responsabili, il progetto di rigenerazione sociale e nazionale proposto da Mantegazza si fondava su questi elementi essenziali: la promozione di una cultura laica; la salvaguardia della scienza quale strumento indispensabile al progresso umano, morale e tecnologico; la diffusione dei principi della scienza igienico-preventiva; la divulgazione delle norme a fondamento dell'educazione morale, formalmente ispirata a principi di derivazione evangelica; e, infine, l'educazione civica e politica che, intervenendo su una popolazione fisicamente sana e moralmente ben formata, avrebbero consentito agli italiani di acquisire un profondo sentimento patriottico.

⁹⁶ Camera dei deputati, *Discussioni*, tornata del 21 aprile 1866, cit., p. 1787.

⁹⁷ Si veda *ibid.*

⁹⁸ Camera dei deputati, *Discussioni*, tornata del 20 aprile 1866, cit., p. 1768.

⁹⁹ *Ibid.*, p. 1789.

¹⁰⁰ Mantegazza, *Ricordi politici*, cit., p. 174.

Escrever, Recortar, Colar: «Acervo de vivências» nos cadernos da professora Luzia (Porto Alegre/RS/Brasil, 1989-2010)

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Write, Cut, Paste: «Collection of experiences» in the notebooks of Professor Luzia (Porto Alegre/RS/Brazil, 1989-2010)

ABSTRACT: The article aims to analyze Luzia's notebooks and what she kept inside them, recognizing biographical evidence on the pages of these writing supports. As a space for historical investigation, these personal archives preserve fragments of their memories, amid other themes, especially those related to Education and Culture. Moved by what affected her, Luzia began to read, write, cut, paste, organize and store. We understand that one of the keys to capture it is the perception of different dimensions of its paths, which appear in its archives: on the one hand, the dimension of intimacy; on the other, the dimension that includes traces of his intellectuality, unfolded in the myriad of interests that make up his trajectory. This methodological path of analysis, guided by what she chose to archive as categories of memories, allowed us, at last, to get close to the person Luzia.

EET/TEE KEYWORDS: Teachers' memories; Personal archives; Egodocuments; Brazil; XXth Century.

1. *Luzia, seus cadernos e os percursos de si*

A ideia de que os fragmentos do passado sobreviveram em virtude de seu valor e de sua significação é uma ilusão, uma vez que os próprios processos de conservação são extremamente aleatórios¹.

Ao nos depararmos com os cadernos da professora Luzia, tivemos a mesma percepção de que nos fala Sabina Loriga (2011). Refletimos, questionamos e, enfim, apostamos na virtude, valor e significação desses artefatos da cultura escrita para a construção dos percursos de uma professora da Universidade Federal do Rio Grande do Sul/UFRGS (Porto Alegre/RS-Brasil).

Luzia Garcia de Mello (1932-2013) doou seus arquivos de memórias, nos quais desenvolveu práticas de conservar papeis e de fazer escrituras de si. «Acervos de vivências» é uma expressão utilizada por ela, o que faz pensar em suas intenções autobiográficas como «práticas do arquivamento do eu, no sentido da automodelagem ou da projeção de uma imagem pessoal que sobreviva ao tempo»².

Ao que tudo indica, a professora iniciou essas práticas logo que se aposentou³, em 1989, estendendo-as até 2010, pouco antes de seu falecimento. Em outubro de 2012, uma das autoras deste texto recebeu de Luzia duas caixas de tamanho médio (29 cm x 22 cm) e um pacote amarrado com uma fita amarela. Neste, estavam registros cotidianos de leituras, observações de eventos acadêmicos que participava e dos acontecimentos que vivia. Doou também uma pasta de plástico verde, com documentos do Colégio de Aplicação e Semanas de Planejamento da década de 1960 e duas caixas em que estavam agendas e cadernos, sendo os últimos objetos de análise neste artigo. Essa doação decorreu da necessidade de mudança para um residencial geriátrico e por uma insistência daquela que os recebeu, para que Luzia não colocasse nada fora que fossem registros de sua vida pessoal e profissional⁴. Com o falecimento da professora, suas *reliquias* passaram a habitar outro lugar, estão salvasguardadas no Arquivo de Memórias da Faculdade de Educação/UFRGS⁵, instituição em que ela trabalhou por

¹ S. Loriga, *O pequeno X: da biografia à história*, Belo Horizonte, Autêntica, 2011, p. 101.

² L. Heymann, *Arquivos Pessoais em perspectiva etnográfica*, in I.R. Travancas, L. Heymann (edd.), *Arquivos pessoais: reflexões multidisciplinares e experiências de pesquisa*, Rio de Janeiro, Editora FGV, 2013, pp. 29-42.

³ Em conversas com uma das autoras do texto, Luzia confessou que sua aposentadoria aconteceu nesse ano por pressões de seu marido. Em seu entender, Luzia, afastada do trabalho poderia se dedicar a cuidar da mãe e de uma tia que estavam doentes.

⁴ Uma primeira análise do conteúdo dos cadernos foi feita por M.H.C. Bastos, *Memórias em Caixas: os escritos de Luzia Garcia de Mello (1932-2013)*, in *Anais VIII Congresso Brasileiro de História da Educação, História da Educação: Matrizes interpretativas e Internacionalização*, Maringá/Paraná, 2015, <<https://plataforma9.com/congresso/viii-congresso-brasileiro-de-historia-da-educacao/>> (último acesso: 20.09.2020).

⁵ O Arquivo de Memórias da Faculdade de Educação é um órgão complementar de caráter científico vinculado à Direção da Faculdade de Educação da Universidade Federal do Rio Grande

muitos anos. Lá, seus papéis cultivados configuram-se como documentos, estão higienizados, organizados e disponíveis para consulta local.

Pesquisas com esses artefatos da cultura material são instigantes, e, por que não dizer, difíceis também. Primeiramente, existe a incerteza do acesso. Via de regra, nos casos de doação estão implicados vínculos de afeto que se estabelecem entre quem os produziu e a pessoa a quem se confia entregar os guardados de si. Neste caso, quem os recebeu primeiramente mantinha com a autora dos cadernos fecundas relações. Luzia foi sua professora de História, no Colégio de Aplicação/UFRGS⁶, quando cursava o Clássico (1966-1968). A partir de 1973, foram colegas no Departamento de Estudos Especializados da Faculdade de Educação/UFRGS até sua aposentadoria em 1988⁷.

Entretanto, apesar dos vínculos de amizade que permearam a doação, houve uma triagem daquilo que Luzia desejava disponibilizar, isto é, selecionou uma parte de sua vida arquivada em papéis que, avaliada por ela, poderia ser publicizável⁸. Como nos coloca Pedro Gonzaga, «todos temos dentro de nós um biógrafo forçosamente autorizada (sua censura, o esquecimento, pertence a uma jurisdição que ainda não alcançamos), capaz de atualizar versões, reescrever capítulos [...]». Neste sentido, Philippe Artières explica que os gestos de arquivamento são permeados de intenções autobiográficas, por isso essas são práticas de «construção de si mesmo e de resistência. Arquivar a própria vida é querer testemunhar, é querer destacar a exemplaridade de sua vida».

Mignot avalia as dimensões dos arquivos pessoais como «extensões do próprio titular, indicando o caminho, o percurso e os desvios de uma trajetória». Reforça o quanto as ações de interdição e triagem fazem parte das escrituras de si, pois «arquivar é guardar e também esconder»⁹. A partir desses entendimentos, postulamos que as intenções de *guardar-se* de Luzia se

do Sul, localizado na sala 610 do prédio da Faculdade. Reúne documentos representativos da memória da Faculdade e do Colégio de Aplicação, considerando ambas instituições dividiram o mesmo prédio entre 1970-1996. Seu maior objetivo consiste em promover a interação da comunidade acadêmica da UFRGS com o patrimônio histórico-educativo da FAGED, com ênfase na sua história e memória, através da preservação, pesquisa e comunicação dos bens culturais sob a guarda da instituição.

⁶ A Faculdade de Educação e do Colégio de Aplicação/UFRGS são duas instituições com memórias em comum, pois, durante muitos anos dividiram o mesmo prédio e os mesmos docentes. Para maiores informações, consultar D.B. Almeida, V. Lima, *O Colégio de Aplicação da UFRGS e suas precursoras: memórias apagadas (1954-1996)*, «Conjectura: Filosofia e Educação (UCS)», n. 20, 2015, pp. 141-163. V. Lima, D.B. Almeida, *O Colégio de Aplicação/UFRGS e a difusão das classes experimentais secundárias: entre o arquivo e a memória oral (1959-1981)*, «Revista História de Educação», set. 2018, pp. 207-227.

⁷ Luzia também integrou a banca de dissertação de mestrado (1984); no período de realização do doutorado (1988-1994), foi uma interlocutora perspicaz e leitora atenta da tese Bastos, *Memórias em Caixas: os escritos de Luzia Garcia de Mello (1932-2013)*, cit.

⁸ Devido a sua mudança para um Residencial Geriátrico, Luzia, após organizar as caixas, telefonou a uma das autoras para buscá-las.

⁹ A.C.V. Mignot, *Papéis Guardados*, Rio de Janeiro, UERJ, Rede Sirius, 2003, p. 124.

constituem em representações eivadas de subjetividade, mas que permitem, por meio da sensibilidade de quem opera com esses documentos, construir aproximações sucessivas dessa mulher, professora universitária, que atravessou o século XX, chegando ao século XXI, em seus movimentos entre Pelotas e Porto Alegre.

Feitas essas considerações iniciais, cumpre dizer que este artigo objetiva analisar os cadernos de Luzia e o que guardou dentro deles, reconhecendo indícios biográficos nas páginas desses suportes de escrita¹⁰. Assim, indagamos: o que os seus papéis nos contam? Como trabalhar com essas memórias arquivadas, que leituras são plausíveis de se realizar? Acompanhou-nos o propósito de valorizar a singularidade de seus gestos de escrever e de guardar, aproximando-os das práticas de memória docente.

Ler arquivos pessoais é desconstruir no tempo da leitura o tempo histórico de sua produção, para espelhar outro *eu*¹¹. Essa é a tarefa a que se propõem as duas pesquisadoras, *dar sentido e vida para a vida de outrem*, a partir de questões norteadas pelo seu espaço/tempo, sabedoras da provisoriedade de sua reflexão¹². Entende-se que tais artefatos são testemunhos de uma trajetória, inscrita em uma determinada temporalidade. São documentos pessoais, constituídos com marcas de sua autora, que, por isso, permitem conhecer diferentes aspectos de seus itinerários. Como espaço de investigação histórica, esses registros, que guardam semelhanças à produção de diários íntimos, conservam fragmentos de suas memórias pessoais, em meio a outros temas relacionados aos seus interesses, sobretudo Educação e Cultura. Movida pelo que lhe afetava, Luzia pôs-se a ler, escrever, recortar, colar, organizar e guardar. Portanto, nesses cadernos constam, além de seus registros de ordem privada, inúmeros recortes de jornais/revistas, e uma variedade de pequenos papéis com outros tantos apontamentos, os quais discutiremos ao longo deste texto.

Arquivar a memória, para Schütz, é como entrar em «sótãos e porões», geralmente, a parte mais interessante dos velhos casarões, ainda que esses casarões estejam apenas em nossa imaginação. Reúnem a maior variedade de artefatos culturais, nada refugam, tudo podem receber. Organizam-se de forma desordenada, aparentemente, sem neuroses nem traumas, com uma riqueza em que os modismos são postos de lado, as diferenças são aceitas e respeitadas. Tais artefatos podem ser periodicamente recuperados e causar admiração pela atualidade que sua antiguidade não apagou, ou pelo ensinamento que sua futilidade pode apresentar. Tudo depende de quem remexe essas coisas empoeiradas: se alguém com olhos para ver, sentir e aprender ou alguém voltado para a imediatez do seu tempo. Não que os novos tempos não contenham a

¹⁰ Neste artigo, são analisados os cadernos de Luzia e não todo o conjunto documental doado.

¹¹ W.M. Miranda, *Corpos Escritos: Graciliano Ramos e Silviano Santiago*, São Paulo, Edusp Belo Horizonte, Ed. UFMG, 1992, p. 28.

¹² M.Z.F. Curry, *Acervos: gênese de uma nova crítica*, in W. Miranda (ed.), *A Trama do Arquivo*, Belo Horizonte, Ed. UFMG, 1995, pp. 53-63.

possibilidade de sabedoria. Mas essa se constrói sobre um lastro de passado de cuja solidez depende a construção do contemporâneo¹³.

Para Mignot os «porões» são lugares onde se guardam utensílios necessários ao dia-a-dia, públicos. Os sótãos são espaços de recordações, de segredos, de guarda-memória. Nos «sótãos e porões», se guardam, entre tantos objetos autobiográficos, papéis – fios que tecem a memória –, que despertam leituras diversas por outros olhares, para múltiplas relações entre memória e escrita, escrita e redes de sociabilidade, escrita e poder, escrita e cotidiano, escrita e subjetividade, escrita e arquivamento, escrita e singularidade¹⁴. Luzia, ao que tudo indica, teve intenção de construir seu «baú de memórias», sua própria biografia, cultivou o registro de dados, alimentou um arquivo durante vinte e um anos, quando iniciou tinha 59 anos e em seu último caderno estava com 81 anos.

Antes de adentrar nos cadernos, importa trazer algumas informações sobre sua autora. Tais referências auxiliam nas tentativas de nos aproximarmos dela. Nasceu em Pelotas¹⁵/RS, em 29 de setembro de 1932, em uma família tradicional da cidade, filha de Aldo Cotta de Mello, bancário, e de Manoela Chaves Garcia. Além de Luzia, nasceu Maria Alice, 18 anos mais jovem. Faleceu em 26 de janeiro de 2013, aos 83 anos. Em 1979, casou-se com Carlos Alberto Tedesco, falecido em 2012. Fez os Cursos Primário, Ginásio e o Normal no Colégio São José de Pelotas, da Congregação das Irmãs de São José de Chambery¹⁶, educandário feminino fundado em 1910, com internato e externato¹⁷.

Mudou-se para Porto Alegre em 1950 e, em 1951, iniciou o bacharelado e a licenciatura em História e Geografia, na Pontifícia Universidade Católica do Rio Grande do Sul/PUCRS. Como a família permaneceu em Pelotas, Luzia

¹³ Liane SaengerSchütz, *Sótãos e Porões: sacudindo a poeira do Colégio de Aplicação* (Dissertação de Mestrado em Educação), Porto Alegre, PUCRS, 1994, p. 7.

¹⁴ A.C.V. Mignot, *Editando o legado pioneiro: o arquivo de uma pioneira*, in: A.C.V. Mignot, M.H.C. Bastos, M.T.S. Cunha (edd.), *Refúgios do Eu: educação, história, escrita autobiográfica*, Florianópolis, Mulheres, 2000, pp. 123-143.

¹⁵ Pelotas localiza-se no extremo sul do Rio Grande do Sul, próximo ao Uruguai. Trata-se de uma cidade que se destacou no século XIX pela produção do charque, utilizado como alimento dos escravos da cafeicultura em todo o Brasil. Naquele século, o charque foi quase exclusivamente produzido pelo Brasil, tendo como referência as charqueadas em Pelotas. Portanto, era uma cidade rica e próspera, considerando a formação de uma elite atrelada a esse setor da economia.

¹⁶ Ordem fundada em 1648, em Puy na França, pelo padre Jesuíta Jean Pierre Madaille. Dispersas pelo movimento revolucionário francês de 1789, se reorganizam no século XIX fundando a casa de Santo Estevão, em 1807, Aix-le-Bains e Chambery em 1812. Vieram para o Brasil em 1858, estabelecendo-se em São Paulo. Chegam ao Rio Grande do Sul, na cidade de Garibaldi, em 1898. Em Pelotas estabelecem-se em 1910. E. Arriada, *O olhar de Deus: a educação de meninas no Colégio São José de Pelotas (101-134)*, in: E. Tambara, B. Corsetti (edd.), *Instituições formadoras de professores no Rio Grande do Sul*, 2 vols., Pelotas, Editora da Universidade, 2008, Vol. 2, pp. 115-134.

¹⁷ Visava formar jovens moças de uma elite, onde a “boa educação” transcendia o conhecimento das “disciplinas-saber”, aprendiam também, bons costumes, obediência, postura, canto, desenho e prendas domésticas.

morou no pensionato feminino das freiras da Congregação Maria Imaculada¹⁸, na Rua Mostardeiro, ao lado Arcebispado de Porto Alegre.

Na década de 1950, enquanto estudante universitária, envolveu-se com as Artes Cênicas, atuando no Teatro Universitário. Conviveu com os atores Walmor Chagas, Cacilda Becker, Paulo José e outros. Dessa experiência, manteve, ao longo da vida, grande interesse pelo teatro, atividades correlatas e vínculos com membros da classe artística. Foi assiduamente frequente nos eventos do «Porto Alegre em Cena»¹⁹.

Enquanto cursava a faculdade, lecionava na rede estadual de ensino, no Colégio Pio XII²⁰. Em 1958, ingressou no Colégio de Aplicação/UFRGS, a convite de Maria Luiza Osório Cappellari, como professora de História. Nos anos 1959 e 1960, fez o curso de Orientação Educacional/UFRGS. Paralelamente, atuou na Faculdade de Filosofia e Ciências Humanas/UFRGS, no Departamento de Didática, como assistente da professora Graciema Pacheco²¹, na área de Didática e Prática de Ensino. Integrou o Centro Regional de Pesquisas Educacionais /RS (1956-1974)²², instituto de pesquisas vinculado ao Centro Brasileiro de Pesquisas Educacionais/CBPE (1955), criado por Anísio Teixeira durante sua gestão no Instituto Nacional de Estudos Pedagógicos/INEP²³.

A partir de 1970, com a fundação da Faculdade de Educação/UFRGS, passa a integrar o Departamento de Estudos Especializados/DEE, ministrando várias disciplinas. Fez parte do grupo que gestou o Laboratório de Ensino Superior/LES (1968-1988), coordenado pela professora Louremi Ercolani Saldanha, onde atuou ativamente como docente e pesquisadora. Em 1981, tornou-se professora titular da Universidade. Participou ativamente da Comissão Memória da UFRGS. Em 1972, integrou um grupo de professoras da Faculdade de Educação que realizou estágio de estudos na França²⁴. Sobre essa experiência,

¹⁸ O pensionato Instituto Maria Imaculada para Serviço Doméstico e Proteção das Jovens foi fundado em 31 de julho de 1938. Atualmente chama-se Pensionato Maria Imaculada Residência Feminina, <<http://www.pensionatomariaimaculada.org.br/>> (último acesso: 20.09.2020).

¹⁹ Porto Alegre em Cena é um Festival de Teatro promovido pela Secretaria Municipal de Cultura de Porto Alegre/RS anualmente, desde 1994, que inclui debates para artistas e profissionais de teatro, tornando-se um dos mais importantes eventos do Brasil em seu gênero. Compreende cerca de 50 espetáculos a preços populares, em praças públicas, teatros e espaços alternativos, atraindo uma média de 100 mil espectadores a cada edição.

²⁰ Atualmente, denomina-se Colégio Estadual Paula Soares.

²¹ Graciema Pacheco foi a fundadora do Colégio de Aplicação/UFRGS, juntamente com Isolda Holmer Paes, em 1954. Permaneceu vinte e oito anos como Diretora da instituição.

²² Sobre, ver M.H.C. Bastos, *Da escrita ao arquivamento: a fabricação do eu*, in *Anais do VI Encontro Nacional de Acervos Literários Brasileiros. Acervos e a materialidade da Literatura*, Porto Alegre, Edipucrs, 2006. CdRom.

²³ Sobre, ver M.M. Araújo, I. Brzezinski, *Anísio Teixeira na Direção do INEP*, Brasília, Inep, 2006.

²⁴ Sobre, ver M.H.C. Bastos, *Reflets Du Brésil no Centre International d'Études Pédagogiques/ CIEP (Sèvres/França, 1945-1971)*, in C. Boto, J.G. Aquino (edd.), *Democracia, Escola e Infância*, 3 vols., São Paulo, USP/Faculdade de Educação, 2019, Vol. I, pp. 123-151 [e-book].

Luzia relata «fui à França, ao ‘Centre National d’Etudes Pédagogiques’, em Sévres». Comenta que já havia passado o movimento intenso das classes experimentais criadas por Madame Hatinguais e continuadas aqui no Brasil. Destaca, no Rio Grande do Sul, a professora Graciema Pacheco do Colégio de Aplicação da UFRGS, e, em São Paulo, o professor Luiz Contié, como pioneiros na implantação dessa experiência em seus respectivos estados.

Em Paris e no interior da França tive contatos com diversos modelos educacionais, participei de seminários, realizei observações no ‘Institut National pour la Formation des Adultes’ (AINFA), no ‘Centre Peuple et Culture’ e em agências de teleeducação. Na Inglaterra, tive a oportunidade de fazer visita de estudos à Universidade Aberta – ‘Open University’ – que começara a funcionar como modelo novo de universidade no ano anterior (1971)²⁵.

Na década de 1980, fez o Curso de Mestrado na área de Fenomenologia da Educação, sob orientação do professor Joel Martins, na Pontifícia Universidade Católica de São Paulo/PUCSP, com a dissertação «Uma visão crítica da tecnologia da educação: reflexão sob a experiência vivida» (1982).

De sua produção acadêmica, foi possível identificar quatorze títulos, do período de 1969 a 1985, em livros, artigos e relatórios de pesquisa. A maior parte versa sobre prática de ensino, planejamento e organização do ensino, metodologia do ensino superior, laboratório de ensino, tecnologia educacional. Manteve suas parcerias acadêmicas por longo tempo: Graciema Pacheco, Lourenço Ercolani Saldanha, Zênia Raupp do Prado, Merion Campos Bordas, Flávia Maria Sant’Anna e outros tantos colegas da Faculdade de Educação/UFRGS.

Entende-se que esses arquivos pessoais, construídos por Luzia, objetos de análise neste texto, carregam ressonâncias de seus itinerários, portanto, expressam dimensões autobiográficas. Em seus guardados, estão, lado a lado, passado e presente, como nos diz Koselleck (2014), o presente é habitado por múltiplos passados²⁶. Ou seja, ela atribui significados às memórias de infância e juventude, mas se mantém atenta ao presente, cultivando notório interesse por assuntos que se afinam à sua profissão. Postulamos que tais interesses são tributários de sua formação cultural e intelectual, tramada ao longo de muitos anos. Seus papéis arquivados, atravessados por clivagens culturais, geracionais, de gênero, entre outras, «expressam uma forma particular de ver o mundo, constituindo-se em uma das muitas maneiras de narrar sua história de vida».

²⁵ L.G. Mello, *Uma visão crítica da tecnologia da educação: reflexão sob a experiência vivida*, Dissertação de Mestrado/PPGEDU/UFRGS, 1982.

²⁶ R. Koselleck, *Estratos do tempo: estudos sobre História*, Rio de Janeiro, Contraponto, 2014.

2. Encontrar Luzia em seus arquivos: memórias em caixas

Quando me sentia inapto a extrair de minha própria substância o que quer que fosse que merecesse ser colocado sobre o papel, copiava voluntariamente textos. Colava artigos ou ilustrações recordadas de periódicos nas páginas virgens de cadernos ou blocos²⁷.

Ao receber as caixas de Luzia no Arquivo de Memórias da Faculdade de Educação/UFRGS, esteve presente um sentimento de reverência diante dessas materialidades, que expressam aspectos da privacidade daquela que arquivou muitos papeis, assim que se aposentou. Essa parece ter sido uma importante atividade de Luzia ao deixar as aulas na Faculdade de Educação.

As caixas doadas contêm cadernos com anotações, recortes de jornais e revistas, colados ou presos por cliques; prospectos de eventos, de um período de sua vida, de 1989 a 2010²⁸. O arquivo em questão abarca 21 anos de registros, em vinte quatro cadernos, de diferentes tamanhos, espessuras e tipos²⁹. Luzia os datou nas capas. Embora não haja uma fixidez no estilo de escrita dos cadernos, percebem-se intenções de regularidade. São cadernos anuais, mas em alguns anos foi preciso mais de um suporte de escrita para os apontamentos, recortes e colagens.

Em alguns, cria protocolos, com indicação de sessões que reúnem determinados assuntos, como «Cinema», «Literatura», «Re-lembranças», «Educação», mas, em geral, não se mantém fiel, transgride as intenções sobrepondo temáticas, sem maiores preocupações com seu ordenamento. Tinha por hábito fazer muitas listas: nomes de historiadores, títulos de livros, de filmes, de peças de teatro, de diretores de cinema, de dramaturgos. Essa prática de produzir listas em escrituras privadas é antiga, apontada por Foisil (1993) em «diários e livres de raison», dos séculos XVII e XVIII³⁰. Em pesquisas que tomam como objetos de estudo diários íntimos de mulheres dos séculos XIX e início do séculos XX observa-se essa permanência do hábito de elencar fatos, nomes, datas, artefatos domésticos, etc. Nos cadernos de Luzia, junto às listas, costumava escrever bilhetes, como lembretes para si mesma, «ver filme Vozes distantes» (2004),

²⁷ M. Leiris, *Biffures*, Paris, Gallimard, 1948, apud COMPAGNON, 2007, p. 38.

²⁸ A organização do material procedeu-se em dois momentos: primeiramente, sistematizamos os cadernos em ordem cronológica, ação empreendida pela bolsista IC/CNPq/UFRGS Gabriela Castro. Em 2018, no Arquivo da FAGED/UFRGS, o material passou por higienização e catalogação, pela bolsista IC/CNPq/UFRGS Gabrieli Oliveira.

²⁹ Para fins de pesquisa, procedemos a organização cronológica dos cadernos, a caracterização de acordo com a forma. As escritas pessoais, como práticas com suas próprias temporalidades, em suportes diversos, cujo autor busca impregnar ou não uma continuidade textual, muitas vezes não é percebido pelo pesquisador ao dar uma ordenação ao acervo, devido à complexidade dos espaços de escrituras pessoais. Portanto, optamos por manter o acervo conforme foi organizado pela autora.

³⁰ Sobre ver U. Eco, *Como se faz uma tese*, São Paulo, Editora Perspectiva, 1995.

«reler Eugene O Neill» (2007) e «assistir a peça ‘Jornadas’ de um longo dia para dentro da noite» (1990).

Um desejo permanente ao longo da pesquisa foi o de *encontrar* Luzia, *decifrá-la*. Uma primeira constatação: ela parece esconder-se em meio aos papéis guardados. Foi preciso sensibilidade, persistência e um pouco de sagacidade nessa busca. E, assim, entendemos que uma das chaves para *capturá-la* é a percepção de diferentes dimensões dos seus percursos, que comparecem nos seus arquivos: por um lado, a dimensão da intimidade, manifesta nas memórias de infância, juventude e idade adulta, maturidade; por outro, a dimensão que abarca traços de sua intelectualidade, desdobrada na miríade de interesses que compõem sua personalidade. Esse caminho metodológico de análise, pautado pelo que ela escolheu arquivar como categorias de lembranças, permitiu que, enfim, chegássemos perto da pessoa Luzia.

2.1. *Intimismos: as «Re-lembranças»*

A seção que Luzia intitula «Re-lembranças» é aquela mais carregada de subjetividades, permeada por evocações de memórias da infância e juventude em Pelotas e da vinda para Porto Alegre. A metáfora dos sonhos atrelados ao passado é intensa nas páginas dessa sessão, usa as expressões «o sótão e o porão» (1990), «remexer no baú da memória» (1996), «os fantasmas da vida para cima e para baixo» (1998).

E justamente no primeiro caderno, de 1989, encontram-se indícios dos seus propósitos com essas práticas de arquivamento. Após destacar em letras grandes seu nome logo na primeira página, registra «o obstáculo como oportunidade para vencer» e acrescenta, «ousar, criar, rebelar-se, lutar, prazer, criação, liberdade». Em seguida, essas reflexões:

«MUDANÇA 1988

Reconciliação comigo mesma

Linha do tempo (?) (linear) das influências intelectuais e da profissão

Dilema: desfazer de guardar coisas importantes

Desfilar de minha vida sentada de madrugada só, no quarto dos livros

AS BUSCAS DE RAÍZES

Os retornos e as compreensões

O caos de mudança e demolição da casa ao lado

OS SONHOS

1976 A perícia médica no INAMPS – o corredor da miséria»

Na mensagem que, simbolicamente, inaugura a sequência dos demais cadernos, Luzia, intencionalmente ou não, parece querer dar o tom de suas escritas futuras. Pode-se supor que a palavra «MUDANÇA», para a qual usa letras maiúsculas, indique o ingresso em uma fase, que representa o momento

de retirar-se das atividades laborais e começar algo diferente do que vivera até então. Para ela, iniciava-se um tempo de, quem sabe, reconciliar-se consigo mesma, como diz, e, nesse novo ajustamento, conviviam os «dilemas» entre guardar e se desfazer de muitas memórias. Seriam os cadernos os artefatos *escolhidos* para *sepultar* o que não queria esquecer?

Ainda as palavras iniciais do caderno indicam suas «influências intelectuais», do «retorno de suas raízes», dos «sonhos». A última frase sugere³¹ a doença e falecimento do pai: «1976 – a perícia médica no INAMPS, o corredor da miséria». Todas são expressões telegráficas, enigmáticas, mas que sintetizam narrativas que foram desdobradas ao longo dos cadernos, ainda que, muitas vezes, de forma hermética.

Entretanto, ao observar com atenção, vê-se que não foi apenas em 1989 que Luzia expôs seus sentimentos. Em vários outros cadernos, identifica-se a sessão «Re-lembanças» e, mesmo fora dessa sessão, suas emoções aparecem em diferentes páginas, às vezes, escondidas em meio a outros registros. Na abertura de seus apontamentos, em 1995 e 1997, por exemplo, anuncia suas expectativas para o novo ano, mas mantém um certo ceticismo diante do futuro próximo, explícito por questionamentos. Em 1995, diz, «a busca da saída para rotina (rotina doméstica) universo pequeno, cotidiano. Será isso possível? Um re-começo o ‘menos provisório’ o ‘profundo’». E dois anos depois, introduz o caderno com essas palavras «coleccionar instantes ‘aos amargos, não!’ Será possível?». O tema da «rotina» parece que afetava a autora, pois em 2007, se refere à «massacrante penumbra da rotina» e sublinha essas duas últimas palavras.

E, no meio de seus registros do ano 2000, apresenta uma frase da escritora Lya Luft³², autora recorrente nos cadernos, «devemos pensar no que realmente queremos além de agradar os outros. Somos muito melhores do que pensamos e do que esta sociedade burra nos faz pensar». O que interessa é o que ela escreve na sequência, entre parênteses, «dizia isto sempre para os meus alunos» e indica a ideia com uma flechinha. Consideramos este um momento significativo na busca por *encontrar Luzia*, pois a frase escolhida parece ter se transformado em um ensinamento partilhado com os estudantes, com os quais conviveu por muito tempo. Os enunciados da frase fazem pensar na condição das mulheres, em sua autoestima, questões essas que afetam sensivelmente a geração de Luzia. As palavras de Lya Luft podem dizer muito dela, de sua trajetória, a ponto de ter escrito no caderno, acompanhada da observação.

Voltando àquela página do caderno de 1989, em que Luzia reflete sobre a «MUDANÇA», chama a atenção que, em seu verso, existe uma folhinha de papel com as mesmas frases do caderno. Isso faz pensar que talvez tivesse o hábito de primeiro escrever uma espécie de rascunho, que depois seria passado

³¹ O pai de Luzia esteve doente e veio a falecer justamente no período entre 1975 e 1976.

³² Escritora rio-grandense de crônicas e romances, pertencente a mesma geração de Luzia.

a limpo. Tal inferência parece pertinente, pois há outros tantos papeizinhos como este nos demais cadernos, são partes de folhas A4, que às vezes colava, em outros casos, guardava. Cumpre dizer que as práticas de escrever e depois reescrever remetem aos modos de escolarização de outras décadas, como indicam pesquisas sobre essas questões³³.

Suas evocações de memórias íntimas são mais contundentes nos cadernos de 1990, 1996, 1998, 1999 e 2007. Mais uma vez, aparecem palavras envoltas em mistério, cifradas, por vezes difíceis de se fazer qualquer inferência plausível. Em diferentes anotações, refere-se ao seu «baú de memórias», (1990, 1995, 1996), lugar em que seria possível um «reencontro de fases, gestos, trânsito por labirintos interiores» (1995). São memórias povoadas de sonhos, quimeras, marcadamente intimistas e, por isso, desafiadoras para quem se dispõe a examiná-las. Portanto, aqui se destacam fragmentos dos escritos que parecem possíveis de serem analisados à luz da trajetória de Luzia.

Sobre Pelotas, vale-se de uma frase de Lya Luft, em que esta se refere à Santa Cruz do Sul, trocando por sua cidade natal, «eu sai de Pelotas, mas Pelotas não saiu de mim» (2007). Em 1996, evoca essas lembranças:

a casa, o quintal, a mesa da sala de jantar, Colégio Gonzaga, gato pelado e galinha gorda³⁴, as praças, a caixa d'água, o Teatro 7 de Abril, a Rua 15, Capitólio, o Mercado Público, as festas de São João, da Primavera, o Reveillon no Clube comercial, Bailes, as confeitarias, o Normal, as missas de domingo, a Casa Americana, o Bazar Edison.

Ao fazer uma imersão pelas memórias mais longínquas, rememora o que chama «geografia afetiva»:

[...] a rua da casa onde nasci, [...] a casa em que nasci na Felix da Cunha, a sala de visitas, sala dos retratos dos mortos versus salinha com retratos dos vivos num biombo, o pátio, o porão, a adega, o escritório do tatá, o quintal, as árvores frutíferas, laranjeiras, bergamoteiras, abacate.

Em 1990, na sessão «Re-lembranças», fala de mulheres de sua família, «Vovó Rafaela, casou três vezes, episódio da caixa de brincos»; «Tia Gemina, miçangas, reminiscências, casou-se com um de quem não gostava, para não casar com o tio. Amou outro». E prossegue, «meu primeiro grande terror: Madre Colombina». Na sequência, uma série de expressões aparentemente desconexas «colégio de freiras, anjinhos de Nossa Senhora, procissões em

³³ Sobre práticas de escolarização nos anos 1950 em cadernos escolares, consultar, D.B. Almeida, L. Graziotin, *Escrituras marginais: fragmentos de memórias da professora Malvina Tavares (1891-1930)*, «Revista Brasileira de História da Educação», vol. 15, 2015, pp. 109-142.

³⁴ Sobre o Colégio Gonzaga em Pelotas, ver G.L. Amaral, *Gatos Pelados x Galinhas Gordas: desdobramentos da educação laica e da educação católica na cidade de Pelotas (décadas de 1930 a 1960)*, Porto Alegre, PPGE/UFRGS, 2003, Tese (Doutorado em Educação).

Pelotas, Sexta Feira Santa, baile, Corpus Christi, faróis, as viagens pela praia, os farnéis, a Barra do Chuí, utopias, vir a ser, sonho».

Ainda, apresenta uma infância povoada por livros «Monteiro Lobato, Sítio do Pica Pau Amarelo, Os doze trabalhos de Hercules, Malba Tahan, Revista Tico Tico³⁵, O Tesouro da Juventude». Ao mesmo tempo, aproxima essas leituras do que chama de sua «militância política» que, para ela, esteve atrelada à produção de um «jornalzinho no Colégio São José» e, posteriormente, à participação no Diretório Acadêmico da PUC.

No caderno de 2007, dissecar momentos pretéritos, desenvolvendo ideias lançadas nos anos anteriores, descreve sobre as ruas de Pelotas «imaginárias e fantasmagóricas», retoma as evocações do carnaval na cidade, «lança perfume, fantasias, as paradas». E complementa «eu guardo Pelotas e Santa Vitória³⁶ como um tesouro na memória, tesouro no sentido de caixinha de segredos». Afirma que esses escritos eram um modo de «levantar as raízes, mostrar algo esquecido, cidade de grandes mulheres». Lembra das companhias de Teatro em Pelotas como «espaço interior e recriação de si, com as presenças de Procópio Ferreira, Iracema de Alencar, Jaime Costa, Eva Todor». Ainda, escreve o nome da cidade ao inverso «Satolep», uma brincadeira de infância, talvez, e rememora «os flerts, a missa de domingo, as matinês do Capitólio, a terceira plateia, o namorado na cadeira atrás do cinema, às vezes um pequeno afago, um olhar para trás».

Também produz outras narrativas, ancoradas nas suas memórias, mantêm-se nelas em tom de incógnitas, em meio a nostalgias. Neste sentido, apresenta uma reflexão de Assis Brasil³⁷ sobre o tempo da infância, «uma sensação nos acomete quando visitamos os cenários da infância – eles são sempre muito menores que os sentidos de nossa memória. Os tetos são baixos, as janelas exíguas, os corredores breves os pátios minúsculos» e, logo a seguir, aproxima a reflexão de suas memórias «saía pregueada, blusa branca, gravatinha, meia branca três quartos, capa, uniforme de gala, casquete no Colégio São José». E, ainda, escreve «INFÂNCIA – óleo de fígado de bacalhau, cataplasmas de linhaça, ventosas, cálcio».

Seguindo as etapas de sua vida, rememora os tempos de juventude, destaca as «festas de 15 anos» e as «brincadeiras», a «cuba-libre». Lembra também de Santa Vitória do Palmar, cidade bem próxima de Pelotas, onde passava suas férias, que evoca essas memórias:

³⁵ Sobre a Revista Tico Tico, ver Z. P. Rosa, *O Tico-Tico: meio século de ação recreativa e pedagógica*, Bragança Paulista, EDUSF, 2002.

³⁶ Santa Vitória do Palmar é um município próximo a Pelotas/RS, localizado no extremo sul do Brasil, na fronteira com o Uruguai. Luzia costumava passar suas férias escolares nesta cidade, junto a seus familiares.

³⁷ Luis Antonio de Assis Brasil é um escritor rio-grandense, nascido em 1945, autor de muitos romances históricos que representam as memórias de diferentes culturas do Estado do Rio Grande do Sul.

canoa, a telefonista, as balas deguaco de D. Olegária, D. Panchita e as irmãs Lídia e sua mãe, aulas de música, solfejo, os provedores, Noé e Marçal, milho assado no espeto, churrasco de cabeça de cordeiro, boteco de beira de estrada – lingüiça, bolachas, banha, fazendas, panelas, urinóis, pirulitos, coisas de armarinho.

Todas essas anotações oferecem possibilidades de nos aproximarmos mais ainda de Luzia e de melhor conhecê-la. Voltando ao caderno de 1996, observa-se que na sessão «Re-lembranças», ela se coloca entre dois mundos, ou seja, entre «repressão versus os voos de libertação» e identifica a cidade de Pelotas a seu «mundo de repressão». Para a palavra «libertação», produz um acróstico que contempla essas lembranças «cavalgar no pampa, o mar, o encontro com o AVIADOR». Em seguida, indica «a abertura de janelas, a vinda para Porto Alegre, a universidade, o pensionato, arte, ciência, cultura, o teatro, um mundo novo, desafio».

No caderno de 1998, intitula uma nova sessão «As faces de L.», em que reforça as expressões «MAGIA, SONHO, MISTÉRIO, caleidoscópio, fragmentos de memória», afirmando que «palavras são o meu jeito mais secreto de falar». Em 1999, escreve «MEMÓRIA», em letras grandes, «retalhos de memória, memória compartilhada, emoção compartilhada, sonhos perdidos, memórias perdidas, entrelaçadas e reinventadas pelo desejo». Usa Roland Barthes para falar do «fio da memória, a diversidade e o múltiplo». No meio deste caderno, localizamos um pedacinho de papel colado dizendo em itens:

a qualidade da relação, a opção e a escolha, descobrir em si o que vale ou não dentro de si, decidir o que descobrir, não ter medo de errar, cometer erros, não ter medo de sonhar (erros e sonhar sublinhados), fazer o que gosta, aquilo que dá prazer.

Ao redor dessa folhinha branca colada, estão as frases: «o sonho é o começo do homem»; «o poeta é que dá voz ao sonho» (Carlos Nejar) e «escrevendo a mão as palavras tem mais vida» (PatriciaBins).

Em 2007, produz uma espécie de avaliação de seus percursos e registra «o que eu fiz e o que gostaria de ter feito e não fiz», «o passado tão perto e tão distante», «em pensamento retornei à infância», «restaurar o sentido das experiências», «reaprender como é possível ser feliz por tão pouco?», «o vasculhar dentro de si», «re-inventar, cheiro de infância», «existir talvez seja um pouco este re-encontro com raízes atávicas». Rememora os anos 1950, evoca mais uma vez «a juventude, o sonho, o vir para Porto Alegre, sair dos bailes, mil e mil e uma noites».

Em menor intensidade, destaca «re-lembranças de Porto Alegre», dizendo que sua mente está «povoada de recordações». Assim, escreve:

a Rua Florêncio Igartua, os Caixeiros Viajantes, o Parcão (construção), o cinema Coral, os restaurantes, o beijo roubado no terraço, nos bailes da Reitoria, os bailes na 1001 noites, os profissionais da rua: vendedores de puxa-puxa, verdureiros, leiteiros, padeiros, afiadores, pipoqueiros, ...cinemas nas calçadas, a caixa d'agua, o bar da Demétrio, os picnics.

O que podemos pensar sobre Luzia a partir dessas memórias, por vezes obscuras? Tratam-se de escritos de uma mulher da geração que viveu sua juventude nos anos 1950, que enfrentou tempos de transição em relação à sua condição feminina, quando muitas tensões se estabeleceram acerca do seu lugar na sociedade. Luzia, uma professora universitária, que vem de família tradicional de uma cidade que ostentou riqueza no RS em outros tempos, alguém que viveu sua vida entre duas cidades, expõe suas intimidades nesses cadernos, em meio a muitos outros registros cotidianos.

Ao *descobrir* algumas das «faces de L.», como pesquisadoras debruçadas sobre esses documentos, somos atravessadas por sentimentos de comoção por podermos ler palavras que, muito provavelmente, não foram escritas para outrem. Deparamo-nos com memórias fortes, às vezes, sintetizadas em palavras únicas, que, por um lado, parecem indicar lembranças felizes, por outro sugerem uma narrativa de amargura. Essas evocações da infância, da juventude, acompanhadas das reflexões acerca do seu tempo presente, enquanto pessoa adulta e madura, permitem que possamos compor nossa personagem, entendendo-a como uma mulher que não foge de um ethos geracional, entretanto, é alguém que construiu uma curva própria de vida, afastando-se das estereotipias do feminino, dedicando-se a seu trabalho como professora universitária.

2.2. *Outras «Faces de L.»: cotidiano, educação, cultura, política*

Pela análise dos cadernos, percebem-se traços da personalidade de Luzia, para além dos aspectos intimistas. É uma pessoa com múltiplos interesses que comparecem nos seus guardados: história e memória, política, cinema, literatura, teatro, educação, universidade, psicanálise, economia, geografia, ciência, pós-estruturalismo, poesia, música (pouco), vida cultural na cidade, arte, personagens da História, Sociologia, Antropologia, Filosofia. Ainda, desdobrando, percebe-se o quanto era afeita aos temas que começavam a se legitimar academicamente, especialmente na Faculdade de Educação/UFRGS, nos anos 1990, como as discussões acerca do pensamento de Michel Foucault, em suas interfaces com a educação, a emergência de «movimentos sociais, como feminismo, lutas negras, movimentos de libertação nacional». Neste sentido, os cadernos trazem registros das discussões do pós-estruturalismo que se inauguravam na Universidade. No primeiro, de 1989, ao escrever sobre o conceito de poder para Michel Foucault, faz menção a Jacques Derrida e Franz Kafka. E, nessas anotações, destaca o livro publicado por seu colega da Faculdade de Educação, Tomaz Tadeu da Silva, afinado àquelas discussões, intitulado «Alienígenas na sala de aula»³⁸.

³⁸ Livro que se tornou emblemático nas discussões acerca da educação nas interfaces dos

Pelas análises dos escritos, percebem-se evidências da Luzia intelectual, manifestada por suas intencionalidades nos gestos de escrever e de guardar. Apesar de afastada das atividades docentes, mantinha-se conectada com as mudanças que se instalavam na epistemologia do conhecimento, e, ao mesmo tempo, atenta ao que acontecia no mundo, em um sentido *lato sensu*. Gomes e Hansen consideram os professores como intelectuais mediadores, porque atuam na formação de outros profissionais, «objetivando disseminar práticas e saberes que seriam responsáveis por circunscrever campos disciplinares e conferir uma identidade a seus membros»³⁹.

Entendemos que tal conceito se aplica à trajetória construída pela professora Luzia na UFRGS. Ao se aposentar, ingressou em um novo momento, mas continuou a cultivar os mesmos interesses que nutria enquanto atuava na docência. Sendo assim, evidencia apreço por um mosaico de escritores, locais, nacionais e internacionais, inscritos em campos diversos, conforme denotam seus cadernos: os historiadores Decio Freitas e Voltaire Schiling, reflexões, poesias e crônicas de Luis Pilla Vares, Flavio Tavares, LuisFernando Veríssimo, Moacyr Scliar, Lia Luft, Clarice Lispector, Frei Betto, Ferreira Gullar, Mario Quintana, José Saramago, Paulo Freire, Michel Foucault, Roland Barthes, entre tantos outros.

Como já foi dito, os cadernos estão repletos de recortes de jornais e revistas, provenientes de suas leituras cotidianas, das quais recolhia a maior parte dos assuntos que a mobilizavam. Entre os periódicos locais, Correio do Povo, Jornal Zero Hora, e, em menor quantidade, notícias da imprensa de grande circulação nacional, como Jornal do Brasil, Folha de São Paulo, Revista Manchete, Revista Veja.

Entre as sessões de consulta da imprensa, observa-se um número expressivo das que abordam temas de Educação e Cultura. Também se vê sua preferência pelos assuntos da «Política» e pelas notícias locais, nacionais e internacionais que lhe impactavam. Luzia tinha por hábito sublinhar partes dos textos lidos e, para além dessas marcações, fazia inscrições nos textos, registrando suas opiniões ou escrevendo uma explicação a mais na própria página do jornal ou revista. Cabe ressaltar que há um caderno temático, produzido entre 2006 e 2009, exclusivamente sobre cinema e teatro, mas com a predominância da sétima arte.

Em relação aos temas da «Educação», Luzia mantinha o hábito de produzir sínteses das atividades acadêmicas que ainda participava: aulas inaugurais da UFRGS, cursos, palestras. Este é mais um indicador de que permanecia vigilante diante dos acontecimentos da Universidade. Um bom exemplo é a anotação das datas das defesas de Teses de Doutorado de duas colegas, Petronilha Beatriz

estudos culturais, organizado por Tomaz Tadeu da Silva (1995).

³⁹ A.C. Gomes, P.S. Hansen (edd.), *Intelectuais Mediadores: práticas culturais e ação política*, Rio de Janeiro, Civilização Brasileira, 2016, p. 20.

Gonçalves e Silva e Nara Bernardes. Essa prática de produzir sínteses também comparece na Sessão «Cinema», pois são muitos os resumos dos filmes que assistia.

E sua face como professora de História também se revela nos cadernos. É forte seu interesse em relação à História e suas transformações, que também são datadas no Brasil a partir dos anos 1990. No caderno de 1990, faz referência às categorias da História «História da leitura, História das ideias, História das mentalidades, História do cotidiano». Neste ano, escreve mais sobre o que chama de «Nova História» e suas inscrições na França, cita Jacques Le Goff, Phillipe Ariès, Pierre Nora e fala da Escola dos Annales. Reflete acerca desses novos paradigmas historiográficos, ancorado na «revalorização da narrativa com temáticas ligadas aos costumes reúne a qualidade acadêmica e o prazer do texto». Demonstra também estar conectada às discussões acerca do conceito de verdade na História em suas interfaces com a ficcionalidade. Traz a frase de Nietzsche «Não há superfícies realmente belas sem profundezas medonhas», diz que «História e ficção são intercambiáveis» (caderno de 1991). Complementa com as reflexões – «o escritor como arqueólogo dos costumes e investigador do cotidiano, aprender a escrever: a força do detalhe, a importância da descrição, a necessidade de compor com verossimilhança as personagens». E conclui com uma ideia de Balzac sobre ficção e realidade «inventar a história tal qual ela era». E, sobre a História da América, encontramos um papel colado com as anotações «a descoberta da América Latina e do Brasil a partir da Europa com Enrique Dussel, história da cultura latino-americana, categoria da alteridade», evidenciando que não era apenas a historiografia francesa que lhe afetava. Ainda, localizamos apontamentos sobre «o ensino de História e a criação do fato», apresenta Michelle Perrot e seu tema de estudo «história das mulheres». Atenta às produções locais, cita a professora Sandra Pesavento e suas discussões sobre estudos feministas e faz referência ao médico Ivan Izquierdo em relação ao tema da «memória».

Há, ainda, no meio de muitos dos cadernos, uma série de fichas com registros de «depoimentos sobre televisão, cinema e teatro», áreas de seu interesse desde jovem. São entrevistas realizadas no programa «Canal Livre», da Rede Bandeirantes: Jorge Semprun⁴⁰, Henriette Morineau, Raul Cortez, Bibi Ferreira, Jardel Filho, D. Helder Câmara e tantos outros. Programas de rádio, da mesma forma são registrados, como a entrevista de José Lutzberger, à Rádio Guaíba, sobre Reforma Agrária, em 25 de setembro de 1984, às 9h. Faz registros também de outros programas de tevê que assistia: Programa Conexão Roberto D'Ávila da Rede Manchete, Roda Viva, Entrevista com Marília Gabriela, programas do GNT em geral. Do mesmo modo, identificamos registros de palestras que

⁴⁰ De Jorge Semprun, lê *Um belo domingo* e anota, da página 95, «SER estudante é mais do que uma vocação, a consequência de certa carga sociológica»; «a fragilidade da felicidade».

assistia no Instituto Cultural Goethe, em treze fichas, preenchidas frente e verso (caderno, 1995).

Nestas fichas, também é possível identificar algumas leituras que realizou: Zaia Brandão (O Estado da arte da pesquisa sobre evasão e repetência); Hannah Arendt (A Condição humana); Jürgen Habermas (Conhecimento e interesse); Luiz Câmara Cascudo (Folclore); Inácio de Loyola Brandão, Pedro Goergen. Outras, de 1984, trazem excertos de pensamento: «Sapo não salta por boniteza, mas sim por precisão» (Guimarães Rosa); «As tragédias dos outros são sempre uma banalidade desesperante» (Oscar Wilde); «Ninguém sabe o que acontecerá quando as pessoas começarem a acreditar nelas mesmas» (Fernando Gabeira), Hannah Arendt «As origens do totalitarismo» (caderno, 1991).

A leitura de seus manuscritos possibilita estabelecer relações com grandes marcos da História do Brasil naquela temporalidade. Em 1990, por exemplo, ela faz uma análise do discurso do primeiro Presidente do Brasil eleito pelo voto democrático, Fernando Collor⁴¹ de Mello, após mais de vinte anos de ditadura civil militar no país. Luzia questiona tal eleição, com esses dizeres: «lógica, eficiência, competição, desenvolvimento. Salvador? Predestinado? Demagogo? Campeão de karatê, modelo em desfiles de moda masculina?». Acrescenta «impecável ao vestir, no penteado, gestos estudados, parece que há um plástico protegendo-o: as coisas não o atingem humano? Robô? Superhomem?». Podemos inferir que, como uma pessoa intelectualizada que era, se permitia o benefício da dúvida e, por meio de indagações, suspeitava dos discursos que procuravam instituir um personagem político legítimo como o Presidente da República.

E o que mais Luzia guardava dentro dos cadernos, além da infinidade de recortes de jornais e revistas? Encontramos, no caderno de 2007, um bilhete de uma amiga no verso de um texto intitulado «Chronos, o tempo da vida». O bilhete diz «Luzia, querida amiga, pelas tantas vezes em que teu caminho iluminou o meu chronos, não pude ler a mensagem que te envio sem me lembrar especialmente de ti». Há outros papeis, como um proveniente da Faculdade de Educação, lugar de seu ofício docente, provavelmente uma mensagem com texto de Paulo Freire em homenagem ao dia do professor, datada de 15 de outubro de 1997. O fato de ter guardado essa mensagem, mesmo depois de alguns anos afastada da Universidade, indica os afetos que a mantinham no mundo acadêmico.

O manuseio dos cadernos também permite identificar uma espécie de rede de sociabilidades. Em 1989, há um escrito em que está registrado «remessa de exemplares», ela elenca endereços, nomes de Programas de Pós-graduação, de professores e faz uma lista de convites. Entre os convidados estão Graciema Pacheco, Renita Allgayer, Rovilio Costa, Petronilha Gonçalves e Silva, todos professores da Faculdade de Educação, e também a Biblioteca Central da

⁴¹ Presidente eleito democraticamente em 1990. Sofreu processo de impeachment em 1992.

UFRGS, Essas anotações teriam referência a algum livro que escreveu e para o qual preparava um lançamento?

Além disso, localizamos um encarte com dizeres de Frederico Garcia Lorca e também encartes da 42^a Feira do Livro em Porto Alegre⁴², de 2007, evento pelo qual Luzia demonstra muita simpatia, haja vista a quantidade de referências a este evento, que é anual em Porto Alegre. Neste encarte, escreve a palavra «Esperança», seguida de:

A praça e os jacarandás. Ler ajuda a viver, a ensinar, a perguntar, estimula a imaginação. Ler é descobrir a força das palavras. Os livros ajudam a interpretar o cotidiano, a iluminar os nossos labirintos e fazem a vida mais densa e mais digna.

Pelo exposto até aqui, percebe-se que nada nos cadernos faz pensar nas escritas tipicamente feminilizadas, marcadas por uma determinada estereotipia do gênero. Nos seus escritos e guardados, não há receitas culinárias, nem mesmo possíveis cuidados a casa. São papéis conservados por uma mulher intelectualizada, professora universitária, em conexão com o mundo que habitava. Entretanto, ao vasculhar essas materialidades, localizamos alguns indicativos de situações prosaicas de seu cotidiano, às quais ninguém parece escapar. Em 1996, faz uma lista dessas situações e são nelas que aparece o nome de seu marido, «limpar coisas atrás do fogão, cadeiras salas, blusas Luzia 2, camisa Tedesco, lavanderia: 2 toalhas amarelas, quarto da mamãe – limpar almofadas, ver roupas de cama quartinho, folhagem, água».

No caderno de 1990, na última página, há outra lista com nomes de champagnes e vinhos, mas a letra é diferente. Seria a letra de Tedesco a invadir este espaço gráfico de Luzia? Ainda neste suporte de escrita, seguem-se várias anotações dispersas, como «telefone do Instituto de Cardiologia, expressões típicas, teatro em Pelotas, autores de livros: Zuenir Ventura, Patricia Bins». Ainda o ditado «água mole em pedra dura...» e o verso de Gilberto Gil «o melhor lugar do mundo é aqui e agora».

Em contato com parentes de Luzia, foi possível localizar fotografias suas e da família. E uma agenda⁴³, com dedicatória de sua irmã Maria Alice, datada de 27 de outubro de 2000, o qual foi preenchido até novembro de 2001. Diferentemente dos cadernos, esse traz somente escritos de Luzia, que também o divide, nas últimas páginas, em sessões: frases e ditos populares, diversos, dados, cinema, teatro e uma listagem dos eventos que participou no período⁴⁴, evidenciando uma vida cultural intensa. Os escritos são relativos às suas leituras

⁴² A Feira do Livro de Porto Alegre é um evento cultural anual na cidade, acontece sempre nos meses de novembro. Localiza-se ao ar livre, no Centro Histórico da cidade, na Praça da Alfândega.

⁴³ Agenda, tamanho 17,5 cm x 11 cm, que não traz datas impressas; com capa de couro decorada.

⁴⁴ Por exemplo, em setembro de 2001, participou do Porto Alegre em Cena, Seminário de Literatura, Seminário Filosofia Política e Metafísica, Filosofia e Música, Fórum Mundial de Educadores, Exposição de Fotografias.

(Isabel Allende, Jacques Prévert, Saramago, Sérgio Capparelli, Honoré Balzac, Oscar Wilde, Carlos Fuentes, Samuel Beckett, Jorge Luiz Borges), apontamentos dos eventos culturais que participa, dos filmes e programas de TV que assisti. Há somente dois registros pessoais. O primeiro intitulou «Re-lembranças 1980-1981», referindo-se ao período que morou em Brasília, em que elenca viagens de férias (Goiás, Minas Gerais, São Paulo, Paraná, Santa Catarina), que caracterizou como «andanças e o conhecer um pouco o universo interiorano do Brasil». O outro, em 26 de junho de 2001, às 22 horas, extravasa a emoção da chegada da irmã, que morava havia muitos anos nos Estados Unidos com os filhos, únicos parentes diretos:

Aleluia, Aleluia! Uma grande notícia enfim: Maria Alice vem ao Brasil na próxima semana! [...] Sua vinda é como um presente que a gente deseja, namora aquilo, espera ganhar um dia. Presente com dois significados: tempo presente – estar aqui e agora; presente – algo bom e desejado que a gente recebe. Alegria! Alegria! Alegria!

Segundo Artières, «passamos assim o tempo a arquivar nossas vidas: arrumamos, desarrumamos, reclassificamos. Por meio dessas práticas minúsculas, construímos uma imagem para nós mesmos e às vezes para os outros». Por meio dessas análises, pretendemos «tirar do esquecimento este volume de impressos que sobreviveram ao desgaste do tempo». Os cadernos de Luzia são arquivos dotados de complexidade que merecem investigações apuradas. Entendidos como representações do real, misturam intimidade e publicidade, deixam ver um pouco de sua autora e permitem aproximações de sua trajetória, pois «a escolha, a classificação dos acontecimentos, determinam o sentido que desejamos das às nossas vidas». São, portanto, práticas do arquivamento do eu, dotadas de intenção autobiográfica como uma espécie de «construção de si mesmo e de resistência»⁴⁵.

Finalizando

Esses artefatos da cultura escrita, por meio da pesquisa, adquirem uma vivacidade, transformam-se em documentos potentes para o campo da História da Educação. Isso é, formam *pontes* entre *nosso mundo e outros*, infinitamente ricos. Nas práticas de arquivamento de si, perenizam-se memórias que põem em evidência a história de uma mulher, tomada em perspectiva singular, mas sem excluir as dimensões da memória coletiva. O arquivamento é um baluarte contra a mortalidade e o esquecimento. Guardar e arquivar se ligam aos atos de representar a memória, uma das formas de se *transmitir* o passado. Os

⁴⁵ P. Artières, *Arquivar a própria vida*, «Estudos Históricos», vol. 21, 1998, pp. 9-34.

escritos de Luzia são arquivos de sua memória, que despertam leituras diversas por outros olhares, para múltiplas relações entre memória e escrita, redes de sociabilidade, singularidades e subjetividades.

No caderno de 2007, Luzia escreve a frase de Oscar Wilde «eu nunca viajo sem o meu diário». E prossegue a reflexão sobre o «diário de bordo», com essas palavras «a vida pode ser comparada a uma viagem por mares nunca dantes navegados. Nunca sabemos onde vamos chegar, nem sabemos das tormentas que nos esperam. Vamos navegando vamos vivendo e vamos escrevendo».

Meses antes de seu falecimento, em junho de 2012, sofrendo com problemas cardíacos e dificuldades de locomoção, decorrentes da paralisia infantil, e não podendo estar com as amigas, manda uma mensagem

Às queridas amigas

Não podendo estar presente pessoalmente, e embora o sofrimento e a dor física, quero enviar uma simples mensagem ao ‘querido grupo’.

Assim, a minha palavra hoje para nós é SONHO [...]

Como diz Oscar Niemeyer, exemplo de criatividade, de inovação, de vida, enfim de sonho mesmo:

‘A gente tem é que sonhar para que as coisas aconteçam, senão elas não acontecem’.

Contudo, digo eu, isto não é fácil. É difícil, mas possível?

Acho que sim, não sei.

Numa peça teatral, que também é um poema, de Fernando pessoa, ‘O Marinheiro’, que eu representei um dia (há muitos idos!!!!), uma personagem que assim fala, cujas palavras do poema ficaram até hoje na minha mente. Pergunta ele: ‘por que se morre? Talvez por não se sonhar o bastante. E não sonhar faz mal à saúde. Não valeria a pena, então, fecharmo-nos nos sonhos, esquecer a vida, para que a morte também nos esquecesse?’.

Ah! Minha gratidão a vocês pelo incomparável apoio, pelo carinho, compreensão, dedicação, doação, especialmente em momentos tão difíceis.

Um afetuoso abraço,

Luzia.

Essas palavras são uma espécie de síntese de quem foi esta mulher, que representa seus interesses, afetos, memórias e comovem pelo desejo de vida, alimentado pela importância de continuar a sonhar. Luzia pressente seu fim neste texto, mas ainda aposta no sonho como uma potência que move a continuidade da vida.

As práticas de escrita, recorte e colagem construíram e alimentaram o arquivo pessoal de Luzia, durante muitos anos. Enquanto analisávamos cada caderno, ficávamos a imaginar aquela que os produziu. Aonde ficariam os cadernos em sua casa? No seu quarto? Na sala de estar? Guardados em gavetas? Em seu escritório, sobre uma escrivaninha, junto a tesouras e tubos de cola, em meio a jornais, revistas e livros? Os cadernos acompanhariam sua autora por diversas dependências da casa? Resta pensar nesta mulher, em uma noite fria de inverno, noites essas comuns em Porto Alegre, no refúgio de sua casa, enquanto olha pela janela o entardecer, senta-se junto a uma mesa e põe-se a retomar as notícias do dia, recorta o que mais lhe afetou, faz cópias, depois, procura

anotações de uma palestra que assistiu na Faculdade de Educação, guarda no caderno para passar a limpo amanhã. Em seguida, procura pelos novos filmes que entrarão na programação dos cinemas da cidade, escolhe alguns para ir no fim de semana, copia as sinopses. Em meio a essas práticas, rememora tempos longínquos, lhe vêm à mente memórias confusas, parecem inconstantes, talvez. Não perde tempo, registra o que lembra no caderno que a acompanha no momento, pois como ela mesmo diz «minhas raízes estão plantadas nas minhas recordações hoje» (caderno, 2007). As notícias do instante presente podem esperar um pouco.

European cultural convergences in Spain during the 19th Century: the *Institución Libre de Enseñanza*

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ABSTRACT: The aim of this paper is to study the modernization of Spanish culture and society in the 19th century. One of the most relevant cultural, educational, social and political projects in Spain at the turn of two centuries is analyzed: the *Institución Libre de Enseñanza*. It was founded in 1876 and brought with it an impulse of new ideas. This paper focuses on analyzing the convergent factor of diverse European ideas and their influence on the Spanish culture. To this end, the article presents the framework of international relations and the different complementary, convergent and mutually influential dimensions: philosophical, educational and the confluence of European and Spanish personalities or forms of thought. These convergences demonstrate the globality and transversality of the *Institución Libre de Enseñanza*, which became an engine of social change through cultural modernization. This process affected not only education, but also generated a whole stream of innovation in Spain.

EET/TEE KEYWORDS: History of education; Spanish culture; Educational projects; Spain; XIXth Century.

Introduction. Cultural transfers

This article analyzes the *Institución Libre de Enseñanza* (ILE), a Spanish educational entity, with rich philosophical, educational, cultural and scientific nuances, and its importance from the cultural, social and educational point

of view. It was created in 1876 by a group of intellectuals gathered around Francisco Giner. Its main objective was to train tomorrow's men and women by providing a comprehensive, tolerant and modern education. It was an Institution with a reformist intention. The *Institución Libre de Enseñanza* promoted a scientific and cultural education free of Catholic influence and, as Holguin¹ indicates, free, but with nuances, of all political affiliation. The forward-looking intelligentsia who supported, managed or participated in the *Institución Libre de Enseñanza* saw a change was necessary in the key areas of the country. And therefore, they invested in the ideal of taking an individual education as a force for change, as can be seen in the speech read at the inaugural session of October 29, 1876, by Laureano Figuerola², who served as President at the Institution's First Facultative Board.

When we speak of cultural transfers, it is necessary to reflect on what is meant by transference, the modes of transference, the hybridizations of transfers with their own characteristics, and the way in which they were settled. Thus, cultural transfers may be legal, economic, political, and of course educational, considering that «the transnational circulation of ideas, practices and objects does not take place by itself, but depends on specific instances and mechanisms operating within a web of connections»³, analyzing the intermediaries and the activities resulting from the transfer.

This paper focuses on a global, international perspective, analyzing a concrete historical situation, focusing on specific human, spatial and temporal connections between ILE and Europe, but with the caution that these connections and transfers, borrowings and translations, should be identified them as similar, but interpreted them according to their own context⁴.

The place where this institution was born and developed is weighed down with instability in the political and social sphere of 19th century Spain, which went through a tortuous and difficult path. As a result, there was an alarming lack of progress in comparison with the industrialized European countries. The social and educational situation of Spain is summarized by teachers being poorly educated and poorly paid, authoritarian education, lack of democratization and lack of schools, which led to the attempts at educational renewal of a lay nature such as the ILE introducing in Spain new ideas and Educational theories that were developed in the main European countries⁵. Therefore, if

¹ S.E. Holguin, *Creating Spaniards: culture and national identity in Republican Spain*, Wisconsin, Wisconsin Press, 2002.

² L. Figuerola, *Discurso leído en la sesión inaugural de la Institución Libre de Enseñanza el 29 de octubre de 1876*, «BILE», n. 16, 1877, pp. 61-63.

³ C. Mayer, *Circulation and internationalisation of pedagogical concepts and practices in the discourse of education: The Hamburg school reform experiment (1919-1933)*, «Paedagogica Historica», vol. 50, n. 5, 2014, p. 581.

⁴ R. Grew, *Expanding worlds of world history*, «The Journal of Modern History», vol. 78, n. 4, 2006, pp. 878-898.

⁵ J. Pericacho, *Pasado y presente de la renovación pedagógica en España (de finales del Siglo*

we bear this in mind, we can better understand the reformist thought of those who gave life to the institution. The delay in Spain compared to neighboring countries made the intelligentsia of the moment look to Europe as a reference to improve their situation. Therefore, we can say that these reformist interests found their answer in the ideas of European progress in the various fields of science, philosophy or politics. In this phenomenon, the influences of teachers, scientists and philosophers, among others, are important because they permeated the minds of Spanish intellectuals during the decades of the 19th century, a particular phenomenon which gave meaning to the *Institución Libre de Enseñanza*. In this paper, we will try to highlight the different European and Spanish ideas and postulates which converge and cause the origin and development of this educational initiative. It requires an analysis of the processes of Europeanization, an analysis with a broader view of the processes of hybridization and educational and social transfer, through communications, circulation and transactions⁶ that took place in the ILE as space, and the 19th century as time. That is, accepting that thoughts like reforming education did not appear by chance, but due to the approximation of different influences, which were defended and propagated by different personalities of the moment, both Spanish and European. This paper will identify and analyze educational transfers, their objectives, from the European to Spanish context, including ideas, institutions, justifications, attitudes and ideologies, lessons learned over time, countries and actors⁷, which we will observe through the study of primary sources written by the actors and the institutions, principally in the Bulletin of the *Institución Libre de Enseñanza* (BILE), the official communication organ, the Library of the Royal Academy of History of Spain, the Archive of *Junta para la Ampliación de Estudios* (JAE) (Board for Extension of Studies and Scientific Research), and the Archive of National Pedagogical Museum; as well as important bibliography on the subject. Throughout the following pages we will analyze this circumstance highlighting examples of how, thanks to this, the reform of the *Institución Libre de Enseñanza* could largely be achieved.

Spanish history needs a critical analysis of social and cultural exchanges. The place that educational institutions attach to the importance of ILE runs parallel to the process of cultural hybridity. This is not the result of a single encounter, but of a cultural circularity composed of multiple encounters, of cultural lending and borrowing⁸. Thus, the ILE's privileged position on issues

XIX a nuestros días). *Un recorrido a través de escuelas emblemáticas*, «Revista complutense de educación», vol. 25, n. 1, 2014, p. 47.

⁶ L. Cole, P. Ther, *Introduction: Current challenges of writing European history*, «European History Quarterly», vol. 40, n. 4, 2010, pp. 581-592.

⁷ T.D. Jules, *Educational exceptionalism in small (and micro) states: Cooperative educational transfer and TVET*, «Research in Comparative and International Education», vol. 10, n. 2, 2015, pp. 1-21.

⁸ P. Burke, *Cultural Hybridity*, Cambridge, Polity Press, 2009.

such as acculturation, enculturation, cultural adaptation, and relations between cultural exporters and importers, where ideas and practices cross spaces, shape models, shape practices and connect spaces, configuring new categories of analysis that will allow the understanding of individual and collective identities⁹.

It is important to keep in mind that neither policies nor contexts are unique or static, rather they influence each other and affect the process of internationalization and adoption¹⁰, which is observed in many issues of educational transfer in Spain. This confluence, which was always present during its 60 years of life, made the institution more influential¹¹. It began being a center which offered private education and ended up introducing substantial changes in official educational aspects. Undoubtedly, this was due to the different generations of pupils who left its classrooms, and because of various initiatives, such as the National Pedagogical Museum, the *Junta para la Ampliación de Estudios* (JAE), the Bulletin of the Institution (BILE), among others. This gave attention to the project and made it known internationally. We will also analyze the fact that these initiatives are a key element of European avant-garde inspiration, helping to overcome the Spanish isolation towards a progressive Europeanization.

1. *Convergences in a philosophical search*

The philosophy behind the *Institución Libre de Enseñanza* has its origin in the heart of Europe. Spain will embrace Krause's ideas, which will evolve due to a greater degree of adaptation to Spain's changing circumstances. Such is the case that we can speak of a Spanish krausism, rather than a German one.

The purest krausism is a philosophy which sees the world in a pantheistic way. It assumes both the transcendence and the immanence of a supreme being

⁹ G. Ossenbach, M. del Pozo, *Postcolonial models, cultural transfers and transnational perspectives in Latin America: a research agenda*, «Paedagogica Historica», vol. 47, n. 5, 2011, pp. 579-600.

¹⁰ T. Groves, *A foreign model of teacher education and its local appropriation: the English teachers' centres in Spain*, «History of Education», vol. 44, n. 3, 2015, pp. 355-370.

¹¹ It is necessary to make a small precision when we speak of influences in Spanish culture and has to do with the understanding of the phenomenon that we study. The ILE has been studied for many years, but sometimes we miss an overview and analysis, from a critical perspective, perhaps with a postmodernist turn, where we are aware of the ontological distance between the events that occurred in the nineteenth century, and our written accounts of those past events. From this perspective, one can observe in the classical historiography about ILE certain subjectivity in the construction of historical knowledge, based principally on descriptive representations. What we present here, from a social perspective, seeks to deepen the transfers, ideas and perspectives that built the past of Spain and the ILE. On the postmodernist turn and History, it can be seen: K. Yilmaz, *Postmodernism and its challenge to the discipline of history: Implications for history education*, «Educational Philosophy and Theory», vol. 42, n. 7, 2010, pp. 779-795.

(God). However, Krause's philosophy is not a mere theory of the universe and its essence but walks into a moral pragmatism. A new humanism which seeks the reform of the individual to the extent of knowledge of "being" or God¹². From this idea, Krause and the followers of this philosophy put together a collection of works which included not only metaphysical, but also political, social, moral, religious, legal and educational aspects, it is all done in a reformist way¹³.

This complex philosophy was warmly welcomed in Spain due to several reasons. On the one hand, there is an expansion of Krause's ideas in Europe. A journey which starts in Germany and goes to Belgium, the current Czech Republic, France, Holland, Spain, and to a lesser extent, to Italy and Portugal. This expansion was because of a partnership between Krause's followers and the German educator Fröbel. Links and new ways of communication were developed with German, Belgian and Spanish philosophers and intellectuals, which ended with the creation and/or enhancement of different cultural, educational institutions and the defence of certain groups throughout Europe, one of which was the *Institución Libre de Enseñanza*.

If we focus on Spain, we find that there are a significant number of intellectuals who belong to the bourgeoisie in the first half of the 19th century, and that are interested in changing many areas of the country. The reason was the dissatisfaction with the different social, economic, political and educational situations of that period, which would extend until the end of the 19th century and its full development at the beginning of the 20th century with the main figures of the Regenerationism (Lucas Mallada, Joaquín Costa and Rafael Altamirano). As a result, and from the most progressive political thought, the intellectuals look at Europe as an area of progress, as a place to find the solution to the backwardness, poverty and instability plaguing the country. In this sense, they tried to see what issues of the state organization chart from other European countries could be implemented in the Spanish state to improve the situation¹⁴. There were two European countries which could be used as an example: France and Germany. The former was discarded because of the recent conflict lived with the Napoleonic empire and the discrepancies with Victor Cousin since his ideas were more appropriate for the moderate wings. Therefore, the German alternative, and namely Krause's philosophy, was the option chosen to reverse the prevailing dominance of scholasticism and traditionalism.

¹² B.P. Göcke, *Causality, Emergence, and Panentheism. On the importance of Karl Christian Friedrich Krause's panentheism*, «Zygon», vol. 48, n. 2, 2013, pp. 364-379.

¹³ R. Pinilla, *La propuesta de Krause de una Federación Europea de Estados (1814) a la luz de su concepción universal del derecho*, «Bajo palabra. Revista de Filosofía II Época», n. 8, 2013, pp. 323-334.

¹⁴ M. Suárez, *Libertad, armonía y tolerancia. La cultura institucionista en la España contemporánea*, Madrid, Tecnos, 2011.

The ILE introduced a special perspective on krausism in relation to liberal reformism, a neo-Kantian approach that fostered the free examination of conscience, opposition to the social and cultural situation of Spain of the moment represented in the monarchy and religion, but above all we observe it in the configuration of Spanish liberalism and the formation and education of outstanding intellectual leaders of the Second Spanish Republic that developed between 1931 and 1939¹⁵.

The Spanish krausism is not pure, but it is not entirely native. It will be the result of the convergence between Krause's various defenders as well as his thinking in Europe, and Spanish intellectuals, who thought he was useful to solve Spanish problems. With this, we could say that krausism lives through a transition, an evolution in the Spanish context, which will go from the purest idealism to a more positivist side. There was an approximation or knowledge of Krause's works and those of his disciples Ahrens and Tiberghien, among others. This knowledge was achieved through travel, translations, adaptations and teachings of Sanz del Río, who was the *alma mater* of Spanish krausism, and his disciples, including Francisco Giner¹⁶. In the second period, which goes from 1875 to 1917, there was a transition towards a more scientific and positivist aspect. As a result, the so-called krausopositivism was born¹⁷. To understand this transition, we have to go back to the convergent phenomenon, which was in 1868. It was a period known as the revolutionary six-year period when a progressive government came into power after the revolution of that year, known as *La Gloriosa*. Consequently, freedom of the press, opinion and expression was recognized. This enabled non-Spanish thought currents to come into Spain. The ideas of European scientists like Darwin, Spencer and Wundt did not go unnoticed by the Spanish intelligentsia circles¹⁸, especially through the influence of philosophical ideas of German origin, where ILE's Krausist naturalists and philosophers, welcomed Darwin's theory of evolution, albeit with criticism of its mechanistic component¹⁹. And in places like the Ateneo de Madrid, there were intense debates about new theories on evolution²⁰,

¹⁵ M. Gonçalves, *Manuel García Morente: filósofo da hispanidade, ideólogo do franquismo*, «Revista NUPEM», vol. 8, n. 14, 2016, pp. 65-85.

¹⁶ G. Capellán, *De la filosofía del Derecho a la ciencia política. Una aportación fundamental – y olvidada – del krauso-institucionismo español*, in M. Suárez (ed.), *Libertad, armonía y tolerancia. La cultura institucionista en la España contemporánea*, Madrid, Tecnos, 2011, pp. 152-213.

¹⁷ A. Jiménez García, *El krausismo y la Institución Libre de Enseñanza*, Madrid, Ediciones Pedagógicas, 2002.

¹⁸ S. Hernández, *Discursos sobre la sensorialidad en el fin de siglo español: del krausismo a la ciencia experimental*, «Revista de Estudios Hispánicos», n. 48, 2014, pp. 285-305.

¹⁹ F. Pelayo, *El impacto del darwinismo en la sociedad española del siglo XIX*, «HISPANIA NOVA», n. 14, 2016, pp. 310-329.

²⁰ J. Simó, *Evolución, progreso, devenir: la filosofía de la naturaleza del institucionismo*, in M. Suárez (ed.), *Libertad, armonía y tolerancia. La cultura institucionista en la España contemporánea*, Madrid, Tecnos, 2011, pp. 119-152.

psychology, sociology, etc. That is, there was a great shift to the scientific. Not only from the more experimental level but also socially, producing thereafter the development of Social Sciences in Spain.

2. *Convergences for a new education*

Giner, Cossío, Castillejo and Jiménez Fraud were just some of the most important people to absorb some of the more advanced forms of European thought. The influences which converge in the *Institución Libre de Enseñanza* would not have existed without travel, experiences, and intentions of these men, who were just the tip of the iceberg of a large project in favor of progress and of a pro-European vision. From this circumstance, the educational approach of the ILE cannot be understood if we do not inquire into the many influences which will have to provide a renewed teaching. In addition to Krause's philosophy, this vision of education was a substrate to all European pedagogy which Francisco Giner, his companions and advantaged disciples applied in the institution²¹. The names of Comenius, Rousseau, Pestalozzi and Froebel²², aptly converged integrated in the pedagogical principles put in value and practiced by the members of the ILE. The ILE took the functionality of direct learning, the role of the senses, learning autonomy and the rejection of any bookish knowledge from Rousseau, Pestalozzi and Fröebel²³. Fröebel is also related to Krause in his philosophical base. As a result, there was a hybrid educational and philosophical current which swept Europe, called krausofröbelism. Finally, it should be noted that Krause appears under reminiscences in the ideology of the *Institución Libre de Enseñanza*, although his influence as a philosopher has always overshadowed other facets. He was not only a philosophical and moral support, but the members of the ILE took his comprehensive way of teaching,

²¹ Jiménez García, *El krausismo y la Institución Libre de Enseñanza*, cit.

²² There are numerous documents on this subject, but in particular we refer to the letters written by Cossío to his master, Giner de los Ríos, during his trips through Europe. In particular the letter sent from Berlin on September 16, 1882, where an enthusiastic Cossío writes to Giner the following: «Mad. Schrader en Berlín es la mujer más adorable que he conocido en todos los días de mi vida. Tenemos en nuestra mano ya la clave de todo el movimiento froebeliano en Europa [...] Ella es sobrina de Froebel y ha trabajado con él. Tiene casi todos sus escritos que anoche he visto. Comprenda V. mi alegría. De oírle decir: Nadie en Europa interpreta hoy como VV. el pensamiento de Froebel. Alemania tiene mucho que aprender de España en este punto. Ésas son ideas que todavía no se sueñan aquí; que vendrán, pero en las cuales van VV. mucho más adelantados que nosotros». See *Letter from Manuel Bartolomé Cossío to Francisco Giner de los Ríos dated in Berlin on September 16, 1882*. Archive Francisco Giner de los Ríos Foundation, deposited in the Library of the Royal Academy of History (Spain).

²³ *Official Program of Institución Libre de Enseñanza*, «BILE», n. 13, 1877, pp. 87-94.

of development of the whole person and equality between female and male²⁴. This last idea was represented in the principle of coeducation. Krause's ideal of achieving a harmonious unity of the universe and the individual²⁵ is included by Giner in a vision of the universe which affects multiple areas: spiritual, moral, social, political, educational, etc. This would result in an anthropological vision which places man in a new humanism and connects seamlessly with the regenerating need of 19th century Spain. This anthropological vision is the basis for his educational conception²⁶ and for that of the ILE. In this regard, we must emphasize that education for Giner would not be a mere transmission of knowledge, but an integral action. Nature and reason are an indivisible part of a whole, conception of man and of humanity²⁷.

We see that Giner's anthropological worldview is supported by Krause's ideas. In addition, Giner does not only take advantage of Krause's ideas but also of Krause's disciples, Ahrens and Tiberghien, as well as of Sanz del Río's teachings. However, the richness of his thought and work collect a wide range of Western paradigms, because as his disciple Castillejo²⁸ wrote, Giner received inspiration from Kant, Rousseau, Hegel, Schelling, Wundt, and Krause. Bearing all this in mind, Giner's European influence is unquestionable. For him, travelling, making contact with new pedagogies and sending letters to his colleagues from other schools of thought was a vital action, which he would convey to his disciples and companions.

Manuel Bartolomé Cossío, Giner's outstanding disciple, had a modern European thought character close to the idea of Europeanizing Spain. This character certainly was forged through the various trips which he made throughout Europe. Otero²⁹ collected these trips in his work on pedagogue. After his first stay in Bologna, where he would find his true educational vocation, he made several trips where he collected valuable educational information for the *Institución Libre de Enseñanza*. These trips include the one he made to Brussels, where he attended a conference organized by the Belgian League of Education. In that conference, he presented the institution publicly to the international educational landscape³⁰. In 1882, there were more trips to

²⁴ K.C.F. Krause, *Das Urbild der Menschheit*, Dresden, 1811.

²⁵ A. Sánchez Cuervo, *El pensamiento krausista de G. Tiberghien*, Madrid, Universidad Pontificia de Comillas, 2004.

²⁶ M.N. Gómez, *Educación y pedagogía en el pensamiento de Giner de los Ríos*, Sevilla, Secretariado de Publicaciones de la Universidad de Sevilla, 1983.

²⁷ F. Giner de los Ríos, *Espíritu y Naturaleza*, «BILE», n. 21, 1897, pp. 165-169.

²⁸ J. Castillejo, *Nota preliminar a Filosofía del Derecho de D. Francisco Giner*, «BILE», n. 50, 1926, p. 185.

²⁹ E. Otero-Urtaza, *Manuel Bartolomé Cossío: trayectoria vital de un educador*, Madrid, CSIC, 1994.

³⁰ M.B. Cossío, *El congreso Internacional de Enseñanza en Bruselas*, «BILE», n. 4, 1880, pp. 143-144; 156-15; 170-171.

Europe³¹. His aim was to gather information about Pedagogical Museums. A year later, he travelled to Lisbon, where Giner made contact with Bernardino Machado and Adolfo Coelho. In 1884, they went to London to attend the International Conference of South Kensington. Later, in 1886, along with Giner and other members of the *Institución Libre de Enseñanza*, he visited France, Belgium and England, where he observed the educational organization of these countries. In 1888, he travelled to Zurich and a year later, along with Giner, he attended the commemoration of the centenary of the French Revolution and various educational congresses held in France. Some of the influences he took from his travels were presented by Cossío in the BILE, published between 1878 and 1894, especially the text *Exams in Europe*³², in which Cossío intends to bring to the fore during the National Pedagogical Congress of 1882 celebrated in Madrid. The result of this question demonstrates the relations between this and many important pedagogues in Europe. For the development of this research he sent questionnaires to eminent authorities from different parts of the continent: from France, the Pedagogical Museum of Paris and the *Revue Pédagogique*; from Belgium, the Normal School of Teachers in Brussels and the University of Ghent; from Zurich, the Department of Public Instruction and the University of Lausanne; from Germany, the Normal School for the training of teachers of Kindergarten; from Vienna; from Holland, the Dutch Society of Sciences; from England, the Liberals of the London School Board, the University of Cambridge and the *Education Review*; from Scotland; from Sweden the Nääs Normal School; from Russia, the St. Petersburg Pedagogical Museum; from Italy; from Portugal, the Council of Public Instruction and the University of Coimbra. Therefore, there is a corollary of influences and new knowledge in the minds of Cossío, and his disciples of the ILE, to regenerate Spanish education and society.

José Rafael Claudio Castillejo y Duarte can be considered the third most important member of the *Institución Libre de Enseñanza*, behind Giner and Cossío. This is due to his great clarity and the relevance of his actions³³. He was fundamental in the expansion of the ILE, with projects which were interesting and relevant to the development of education and training, such as the *Junta para Ampliación de Estudios* or JAE (Board for Extension of Studies and Scientific Research). He knew it very well and he defended it in the most difficult times. What is more, he promoted that professionals go abroad to modernize Spanish

³¹ For more details, read the text about Cossío's tour of Europe: E. Otero-Urtaza, *Cossío's European tours between 1879 and 1889*, «History of Education & Children's Literature», vol. 12, n. 2, 2017, pp. 323-341.

³² M.B. Cossío, *Los exámenes en Europa*, «BILE», n. 18, 1894, pp. 4-6; pp. 334-339.

³³ M.I. Rius, *La Enseñanza del francés en el marco de la Institución Libre de Enseñanza (1876-1939)*, Tarragona, Tesis doctoral, Departamento de Filologías Románicas, Universidad Rovira y Virgili, 2006.

culture³⁴. He put Spain in contact with cultural and educational reforms of other countries which were more advanced, and he learnt French, and German, and later English and Italian. He was, throughout his career, a model for his disciples because of his international training³⁵. It is interesting to note that he wanted to create a private multilingual school, which was later called International School³⁶. It had a high value on teaching modern languages. It was a pioneering experience in Spain which gave special attention to foreign languages. We can see here Castillejo's prospective nature because he saw the importance of sending students training in different languages to exchange experiences with neighboring countries in Europe. In his career, which was to evolve and grow in pedagogical concerns, we highlight that he read his thesis on education in England³⁷ and the publication in the BILE of works on the subjects of European education, especially in England, between 1904 and 1919.

The case of Alberto Jiménez Fraud is similar to that of Castillejo. As in the case of Castillejo, Giner acted as his guide. Giner advised him to travel to Germany, France and England in order to expand his knowledge in the world of the law and the educational systems of these countries³⁸. The aim was to fill up on new educational concepts to broaden the horizons of knowledge and to bring to Spain valid experiences of other countries. After these trips, Jiménez Fraud returned to Spain and he was in charge of the newly created Student Residence³⁹. During this period, he would also be fellow of the JAE. As a result, he could attend the Course of Study and the Congress of the International University Federation of Geneva in August and September in 1924. Finally, after the outbreak of civil conflict in Spain in 1936, he would be forced into exile, moving his academic work and teaching to the universities of Oxford and Cambridge⁴⁰. In Cambridge, he gave a series of lectures which were the basis of his most relevant written work, a trilogy about the Spanish university⁴¹.

The human capital was a constant influence on the origin and development of the institution. Nevertheless, there was also another example of European and Spanish convergence. This time, from an institutional point of view rather

³⁴ T. Marín Eced, *Innovadores de la educación en España: becarios de la junta para ampliación de estudios*, Cuenca, Universidad de Castilla La Mancha, 1991.

³⁵ B. Perinián, *Glosa a un discurso de José Castillejo sobre el Common Law*, «Boletín Mexicano de Derecho Comparado», n. 135, 2012, pp. 1239-1270.

³⁶ Rius, *La Enseñanza del francés en el marco de la Institución Libre de Enseñanza (1876-1939)*, cit.

³⁷ A. López-García, *Educación y liberalismo institucionalista durante la Restauración canovista: José Castillejo*, «Espacio, Tiempo y Forma», n. 15, 2002, pp. 157-179.

³⁸ J. Pérez, *Alberto Jiménez Fraud (1883-1964) y la Residencia de Estudiantes (1910-1936)*, Madrid, CSIC/Ministerio de Cultura, 1987.

³⁹ D. Olaya, *Alberto Jiménez Fraud y la Residencia de Estudiantes*, «Ensayos Revista de la Facultad de Educación de Albacete», n. 5, 1991, pp. 101-110.

⁴⁰ Olaya, *Alberto Jiménez Fraud y la Residencia de Estudiantes*, cit., pp. 101-110.

⁴¹ M. Montero, *Liberalism Revisted: The autobiographical writings of Alberto Jiménez Fraud (1883-1964)*, «Culturales», vol. 6, n. 11, 2010, pp. 43-62.

than from individual to individual or from thought to thought. Some Spanish experiences, such as those of the Free Society of Political Economy and The Free Society of Histology, created respectively in 1856 and 1874⁴², or the International College, founded by Nicolás Salmerón in Madrid, which served as background in the creation of the *Institución Libre de Enseñanza*. Another example is that of the Free University of Brussels, which was a model center within European university education. It was a private, secular and liberal center because of its krausist foundations⁴³. Therefore, the members of the ILE also used these influential precedents to launch their center and teaching idea.

The *Institución Libre de Enseñanza* bet heavily on exercise in the classroom, introducing traditional games from various parts of Spain⁴⁴ and from abroad. English influence, which can be seen in the introduction of sports like football, and personal hygiene and home care⁴⁵, along with reliable orientation tours⁴⁶, complete the interest in the cult of the body⁴⁷. Thus, we can establish another cultural and educational transference in the field of physical education and sport, in the relationship between the famous pedagogue and French historian Pierre de Coubertin and Francisco Giner de los Ríos, in which both were interested in the idea of introducing education in educational reforms. This relationship became palpable through epistolary communication between Coubertin and Giner⁴⁸, as well as the exchange of ILE teachers with French initiatives and activities⁴⁹. Therefore, as stated in the program of the Institution, it is intended to arouse interest in a broad general culture, preparing them to be, according to their aptitudes and vocations, scientists, lawyers, doctors, engineers, but above all persons capable of conceiving an ideal and governing with harmony their own lives⁵⁰.

The *Institución Libre de Enseñanza* will run and announce the neutral aspect of education as outlined in its statutes⁵¹. Taking into account the strong

⁴² Otero-Urtaza, Manuel Bartolomé Cossío: *trayectoria vital de un educador*, cit.

⁴³ P. Álvarez-Lázaro, J. Vázquez-Romero, Krause, Giner y la *Institución Libre de Enseñanza: nuevos estudios*, Madrid, Universidad Pontificia de Comillas, 2005.

⁴⁴ R. Ballester, E. Perdiguero, *Salud e instrucción primaria en el ideario regeneracionista de la Institución Libre de Enseñanza*, «Dynamis», n. 18, 1998, pp. 25-50.

⁴⁵ Otero-Urtaza, Manuel Bartolomé Cossío: *trayectoria vital de un educador*, cit.

⁴⁶ S. Martín, *El estudio del medio ambiente en la Institución Libre de Enseñanza: un antecedente de educación ambiental en España*, Madrid, Editora Regional de Extremadura, 2003.

⁴⁷ Sport culture and its application to education in Britain in the late eighteenth and early nineteenth century, understanding sport and social prestige as almost synonymous, inspired the ILE and served as an example for the values that emanated in the British youth, desirable for the Spanish. See K. Waite, *Beating Napoleon at Eton: Violence, Sport and Manliness in England's Public Schools, 1783-1815*, «Cultural and Social History», vol. 11, n. 3, 2014, pp. 407-424.

⁴⁸ M. Martínez-Gorroño, J. Herández-Álvarez, *The Institution Libre de Enseñanza and Pierre de Coubertin: the physical education for training in freedom*, «Revista Internacional de Medicina y Ciencias de la Actividad Física y del Deporte», n. 54, 2016, pp. 243-263.

⁴⁹ J. Uña y Sarthou, *Congreso Atlético de París*, «BILE», n. 413, 1894, pp. 250-251.

⁵⁰ *Official Program of Institución Libre de Enseñanza*, cit., pp. 87-94.

⁵¹ *Bulletin of Institución Libre de Enseñanza*, «BILE», vol. 1, 1877.

Catholic feeling rooted in Spain at the time, the members of the ILE opted for full neutrality. Giner⁵² expressed the need for the school to cultivate the religious meaning of life, but neither Religion nor other forms of life correspond to a single way of understanding them, rather they belong to the different ways of feeling them in intimacy, an echo of the Protestant beliefs.

The members of the ILE argued that it did not make sense to separate the sexes in the classroom when in society both were in permanent contact, being usual in countries like Holland, Germany, Switzerland, England and the United States⁵³. Moreover, if the school environment should be as faithful as possible to life and its context, the institution should not make the mistake of ignoring this aspect. Women's education also provided women with more resources to give their children better education and was a matter of vital importance for many relevant Spanish women of the 19th century⁵⁴.

3. *Products and Initiatives of European Convergence*

As happened with the philosophical basis of the institution, or its own educational gene represented in the pedagogical principles which we have just seen, the convergences between Spain and Europe were also present on another plane. This plane would be that of the progression which the idea of the Institution suffered within itself. Eventually, this idea created new structures, organizations and initiatives which tried to complete the reform task by means of education, progress and culture. To place the reader of this work, the initiatives we will discuss were the following: The Bulletin of the ILE, the National Pedagogical Museum, the JAE, the Student Residence and the Residence of Young Ladies. In the following lines, we will discuss the most important characteristics of these initiatives and their relevance in the Spanish educational, cultural and scientific framework. Everything happened from the framework of convergence between Europe and Spain, key to the success of these endeavors.

The Bulletin of the *Institución Libre de Enseñanza* was a periodic publication, which, as well as reporting on the institution itself, educated its readers with scientific papers written by the most prominent national and international intelligentsia. The plurality of fields of study was widely represented, so the readers knew the most innovative advances in reasoning, or the different

⁵² F. Giner de los Ríos, *La enseñanza confesional y la Escuela. Estudios sobre educación*, Madrid, 1886.

⁵³ See the numbers of 1936 edition of the *Bulletin of Institución Libre de Enseñanza*, «BILE».

⁵⁴ G. Miller, *Disrupting Nineteenth-Century Dichotomies of Gender: Reading and Imagination in Emilia Pardo Bazán's La madre Naturaleza*, «Hispanic Review», vol. 83, n. 3, 2015, pp. 317-336.

materials produced abroad. It was a diffuser of innovations and new ways of thinking, work and research. Its first issue was published on March 7, 1877, and from that date until 1936, it transmitted the culture and knowledge of the moment, which was cut short by the beginning of the civil war in 1936.

The Bulletin structure was divided into different sections. The first section, called *Pedagogy*, grouped teaching issues, educational trends, chronology and description of trips which the members of the *Institución Libre de Enseñanza* made to other European countries. The *Encyclopedia* section collected material on science, art, philosophy, history and other disciplines. The *Institution* section brought issues about the life of the ILE and informed readers about the plans and roads which it was taking. Within the sections of the Bulletin of the *Institución Libre de Enseñanza*, there was a section called *Magazine of Magazines*. It provided a catalog of those translated articles it was offering which, by their scope and content, could be of interest and use to researchers. Therefore, it was an instrument that, in addition to defending and propagating an ideology, led the reader to the knowledge placed at the forefront of the various fields of science and education which were in the most important international journals. Calderón had a list of the most translated and influential journals: «L'Enseignement Public», the «Revue Internationale», the «Revue Pédagogique de l'Enseignement», «Die Deutsche Schule, Die Zeitschrift für Schulgesundheitspflege», «The Educational Review», the «Journal of Educational Psychology», the «Pedagogical Seminary» and the Journal of Education⁵⁵.

In comparison with other publications, it attained a high level, especially, regarding the Spanish trajectory. The number of cultural personalities from Spain and from other European countries that published texts is important, like Rafael Altamira, Gumersindo Azcárate, Giner, Clapared, Decroly, Cossío, Ramón y Cajal, Miguel de Unamuno, Bertrand Russell, and John Dewey, among others. There is no doubt of its importance as a disseminator of knowledge. As Calderón states in the Bulletin, people could read news of learning in the trips and contacts with other teachers⁵⁶. As a result, it became a way of transmitting influences during the last third of the 19th century and the first one of 20th century.

The second initiative was the National Pedagogical Museum. In the historical period in which we move, the high number of new scientific currents was a constant and among them, the pedagogical ones which appeared in Europe. In such circumstances, the Museum exercised a number of duties to be taken into

⁵⁵ M.C. Calderón, *La educación de los sordomudos y ciegos en el BILE*, in M.R. Berrueto Albéniz, S. Conejero López (edd.), *El largo camino hacia una educación inclusiva: la educación especial y social del siglo XIX a nuestros días*, Pamplona-Iruñea, Universidad Pública de Navarra, 2009, pp. 35-46.

⁵⁶ Calderón, *La educación de los sordomudos y ciegos en el BILE*, cit.

account. In fact, one of its basic functions was to contribute as a link between what was taking place outside the borders and the Spanish reality⁵⁷.

Among the mechanisms to carry out the objectives set by the Museum, we can list the trips the staff took to other countries, the conferences by foreign authorities, the exchange of periodicals, the studies on education in other countries, among others⁵⁸. In addition, among their aspirations was to build a library of primary education, similar to the Pedagogical Museum in Paris. The National Pedagogical Museum, «contributed to the modernization of the foundations and educational structures of a country which was mired in absolute pedagogical isolation»⁵⁹.

The *Junta para la Ampliación de Estudios* played a dual role of cultural diffusion and pedagogical training. As a result, as Paul Aubert⁶⁰ points out, the Spanish science was represented within the international scientific community. On the one hand, it allowed cultural and scientific advances in the field to be known by a part of the Spanish active population, and secondly, it put Spain on the international cultural scene. The JAE drove a process of Europeanization which took place in Spain thanks to grants from the agency. These were distributed to students and professionals from all disciplines: medicine, engineering, law, philosophy, history and pedagogy, among others⁶¹. In the case of scholarships in the field of pedagogy, the influence and wealth acquired for Spain was an unrepeatable phenomenon. The most studied areas were school organization and teaching. However, there was also a major influence in the field of the new ideas of the New School, in the studies on vocational guidance and in the field of special education. The fruit of these trips was thanks to the travelers' work published in journals, such as the *Bulletin*⁶², but also in the momentum

⁵⁷ «This is why the Museum of primary education is called to be, and this is another of its capital functions, the organ by which in Spain all the advances that in the order of the first education are verified in the other countries». Report read at the International Education Conference held in London from 4 to 9 August. Published in *Bulletin of the Institución Libre de Enseñanza*, «BILE», vol. VIII, 1884, pp. 313-317.

⁵⁸ See *Museo Pedagógico de Instrucción Primaria: Documentos para su historia: legislación-organización. Memoria sobre sus trabajos* (España, 1886). This document includes, among other aspects, the Program of topics for the Conferences that are part of the opposition exercises established in art. 10 of the regulation of the Museum of Primary Instruction (later called National Pedagogical Museum). They are in themselves requirements for the teaching staff of the Pedagogical Museum. Among the topics to be addressed are: school organization in Germany, North America, South America, Austria-Hungary or Belgium, China and Japan, Sweden and Norway, France, Holland, England and its colonies, Italy, Portugal, Russia, Switzerland in their different cantons; and by specific cities: Berlin, Brussels, London, Paris, Rome or Vienna.

⁵⁹ A. García del Dujo, *El Museo Pedagógico Nacional y las corrientes pedagógicas contemporáneas*, «Historia de la Educación. Revista Interuniversitaria», n. 4, 1985, p. 182.

⁶⁰ P. Aubert, ¿A la Sorbona, a Marburgo o a la Alpujarra? *La Junta para Ampliación de Estudios*, «Circunstancia», n. 14, 2007, pp. 1-31.

⁶¹ See Archive of Junta para la Ampliación de Estudios, JAE, 1907-1936.

⁶² Marín Eced, *Innovadores de la educación en España: becarios de la junta para ampliación de estudios*, cit.

in popular cultural institutions, professional associations and medical charities. In the case of the former, they generated a spirit of educational renewal which today we can validate by accessing these manuscripts.

The JAE would stop working shortly after the outbreak of the Spanish civil war. Consequently, there was an unfortunate situation of scientific and cultural poverty manifested in the cruel postwar Spain⁶³. We are talking about a time when certain circles of the Spanish intelligentsia understood that in order to conquer individual and collective freedom, it was necessary to disseminate culture. For this reason, university students saw the JAE and its creators as a breath of fresh air. As a result, a lot of students applied for a scholarship. The JAE processed more than 9000 applications, of which more than 3000 were granted, and since 1910 it sent a little more than one hundred students abroad so that they broadened their studies, except during the First World War when it arranged only twenty scholarships per year and raised the development trend towards cooperation with the United States⁶⁴.

These agencies would not have been the same if Giner had not encouraged his disciples to look at what other European countries were doing in the field of education. Thanks to this, José Castillejo knew the English format of "Colleges" in 1910 and proposed the creation of a student residence which depended on the JAE. The decree of May 6, 1910, which establishes the foundation of the *Residencia de estudiantes*, also creates a Patronage of Spanish students outside Spain and foreign students in Spain. Its functions include gathering information from schools and the living conditions of the countries of interest for students, spreading the benefits and wealth of education abroad, managing the information requested by students and families for the optimal adaptation to their destinations, having delegates or committees in the main countries visited and offering a full service to foreign students⁶⁵. The Residence offered an intellectual and cultural element which the Spanish university did not provide in those years, such as classes of languages, science labs, classical music concerts, and the like. The large number of professors, researchers, and guest speakers who passed through the residence influenced students significantly such as Federico García Lorca, Salvador Dalí, Luis Buñuel, Severo Ochoa, and their influential contributions to the Spanish culture.

In 1923, the Hispanic-English Committee was founded. It led to closer relations between the Anglo-Saxon world and the Spanish one. Therefore, important English intellectual and scientific figures went to the Residence⁶⁶.

⁶³ López-García, *Educación y liberalismo institucionista durante la Restauración canovista*: José Castillejo, cit., pp. 157-179.

⁶⁴ See *Archive of Junta para la Ampliación de Estudios*, JAE, 1907-1936.

⁶⁵ Royal Decree of May 6, 1910, establishes the foundation of the *Residence of Students*, also creates a *Patronage of Spanish students outside Spain and foreign students in Spain*, «Gaceta», May 8, 1910.

⁶⁶ Olaya, Alberto Jiménez Fraud y la *Residencia de Estudiantes*, cit.

Britain will be one of the most important and relevant focal points for the pedagogues of the *Institución Libre de Enseñanza* and its acolytes, declared Anglophiles and defenders of British education. Great Britain exercised important and relevant influences and educational transfers in Spain through the ILE, as well as the practical realization of the British pedagogy of the moment⁶⁷. In 1924, the Society of Courses and Conferences was founded at the initiative of Alberto Jiménez Fraud. This society wanted to establish direct contact between the highest specialists in every branch of knowledge, the students of the Residence and the general public. As a result, the Student Residence was, like the JAE, an important example to understand the process of penetration into the public sphere of the reformist and liberal point of view. It sought to achieve a renewed and vigorous patriotism where tradition and modernity, pro-European influences and national traits, pragmatism and idealism, realism and spiritualism twined⁶⁸.

At the same time, a *Residence for Young Ladies* was also founded. There will not be initiatives to improve the place of women in society until the 20th century⁶⁹. However, there were feminist movements in the United States or England since the beginning of the 20th century. These initiatives were related to the krausist education circles, the *Institución Libre de Enseñanza* and the Pedagogical Congresses. Examples of these initiatives were: The Association for the Education of Women, the Trade School for Ladies, the magazine *Women's Instruction*, the School of Posts and Telegraphs, the Primary and Nursery school, the Course of Librarians and Archivists, among others⁷⁰.

In the section of convergences, the Residence of Young Ladies funneled through its director, Maria de Maetzu, initiatives and support of the international branch of the feminist movement, represented by the International Federation of University Women, whose 12th Congress was held in Madrid in 1928⁷¹. What is more, the close relationship it had with the "International Institute for Girls in Spain" since its foundation made it accept foreign students who were studying Spanish. Moreover, it organized language classes for those students and for those who had scholarships in the exchanges established by the JAE⁷².

⁶⁷ J.M. Fernández-Soria, *The presence of the British education model in Spain: reception through the Institución Libre de Enseñanza*, «History of Education», vol. 43, n. 1, 2014, pp. 50-71.

⁶⁸ I. Pérez-Villanueva, *El liberalismo institucionista en la Residencia de Estudiantes*, «Studia histórica. Historia Contemporánea», n. 8, 1990, pp. 77-88.

⁶⁹ B. Cantizano, *La mujer en la prensa femenina del siglo XIX*, «Ámbitos», n. 11-12, 2004, pp. 281-298.

⁷⁰ P. Ballarín, *La educación de la mujer española en el siglo XIX*, «Historia de la Educación Revista Interuniversitaria», n. 8, 1989, pp. 245-260.

⁷¹ R. Vázquez Ramil, *Mujeres y educación en la España contemporánea: la Institución Libre de Enseñanza y la Residencia de señoritas de Madrid*, Madrid, Akal, 2012.

⁷² R.M. Capel, *El archivo de la Residencia de Señoritas*, «Patrimonio en la Escuela», n. 11, 2009, pp. 156-161.

This created a very beneficial wealth and cultural reciprocity for residents who that saw their residence could become a constant source of development and intellectual exchange.

Conclusions

In this article we have shown a part of the European cultural transfer in Spain in the 19th century through the *Institución Libre de Enseñanza*, studying the introduction of new pedagogical ideas, the reception of the same by the men and women of the ILE, the transmission through diverse products, and the appropriation of rich nuances that established relations between the importers and exporters, as can be seen in the derived products like the JAE, the Hispanic-English Committee, or the pedagogical international congresses.

The *Institución Libre de Enseñanza* has always been said to be a milestone in the history of Spanish education. We can incorporate this milestone in Europe, from a thought which avoids a local point of view and that is consistent with the awareness of European people of the twenty-first century. The social, cultural and educational transfers that took place in the ILE served as the basis for a comparison and historical awareness, from the perspective of a European history that focuses on transference processes, not from a unilateral reception, but through interactions that implied changes⁷³ and that were observed in the social and cultural practices of 19th century Spain. These changes are understood from the importation of European ideas, but also from the imbrication of the different transfers in the Spanish mentality of the time. In the convergence between countries, political and economic factors play an important role, and in many ways lead the attention. However, the cultural synergy generated by the flow of people and ideas, that is, the relationship between life histories, forms a substrate of convergence, the cultural one, where education and its social influence are as important as the factors cited⁷⁴, as we have observed in this paper.

The institution was born to fight against backwardness, instability, illiteracy and prevailing traditionalism in intellectual, cultural and educational spheres of 19th century Spain. ILE looked at Europe as a paradigm of progress, seeking inspiration from European trends exemplified by pedagogues, philosophers, politicians and scientists of the time, as well as institutional or associative milestones. Educational transfer can be of varying degrees, from simple copying

⁷³ J. Leonhard, *Comparison, Transfer and Entanglement, or: How to Write Modern European History today?*, «Journal of Modern European History», vol. 14, n. 2, 2016, pp. 149-163.

⁷⁴ M. Gamsa, *The Cultural and the Social in Chinese-Russian Relations*, «Cultural and Social History», vol. 9, n. 3, 2012, pp. 391-405.

to emulation, hybridization, inspiration and synthesis⁷⁵. This is what we have seen in the previous paragraphs. Countries like England, Germany, Belgium, Italy, France, Switzerland, among others, converged with Spain in the ideas and actions which represented modernity and culture of different countries. Through its creation and development in the 19th century in Spain, the ILE was an engine of social change, educational and scientific transformation, one of the most important cultural and social movements in Spain since the 18th century, whose transformative power renovated the school and was decisive in Spanish cultural influence from the end of the 19th century until the Spanish Civil War of 1936 that destroyed the Institution⁷⁶.

The success of the confluences shown in the 19th century is clearly observed during the first third of the 20th century, where we can see important European influences in Spain through the ILE, especially French, German and British⁷⁷.

This convergence plays the role of continued support, of supplier of new ideas, of new thoughts, which the members of the *Institución Libre de Enseñanza* used not only for its implementation, but also for its progress and evolution. Over the years, its influence in the country grew, and not only in its center in Madrid. It has been called diffuse institutionalism with the creation of small initiatives, both institutional and personal, in different parts of the country. In addition, the creation of new agencies, such as the Pedagogical Museum, the JAE or the Student Residence, gave more importance to the project, which not only affected the national scene but strengthened the relations with other countries. This put the *Institución Libre de Enseñanza* and new generations of members of the ILE in Europe, creating new forms of international mobility. But men and women of the ILE were not only mere recipients of that thought. They also brought their vision, their reasoning, conceiving a convergence and synergy introduced to Spain in the European movement with the contribution of works, ideas and thoughts which will be heard in the heart of Europe. This destroyed, in part, the isolation and it will strengthen the Spanish intellectual position on the continent.

This paper has analyzed the convergent factor from many facets, in order to provide a comprehensive view of the phenomenon. It has revealed the existence of a philosophical convergence. From this point of view, it has been observed that Spain even played a revitalizing and promoter role of certain ideas born in Europe. Such ideas were not very successful in the beginning. This was represented with the host or development of krausism in Spain. The

⁷⁵ D. Dolowitz, D. Marsh, *Who learns what from whom: a review of the policy transfer literature*, «Political studies», vol. 44, n. 2, 1996, pp. 343-357.

⁷⁶ L. Ruiz-Eugenio, I. Tellado, *Joaquín Sama, la Institución Libre de Enseñanza y su amistad con Giner de los Ríos y los Machado*, «Historia Social y de la Educación», vol. 3, n. 2, 2014, pp. 185-202.

⁷⁷ J.M. Fernández-Soria, *Influencias nacionales europeas en la política educativa española del siglo XX*, «Historia de la Educación», n. 24, 2005, p. 29.

reception and translation of the works of Krause in the country has generated a projection of the philosopher who, otherwise, would have been only a mere second tier philosopher, overshadowed by thoughts like those of Kant or Hegel. But it found in Spain the ideal ecosystem to survive and develop. To such extent that it caused the jump to Latin America, generating there a whole political form and state management with boom and support for a certain sector of the population.

There has been an educational convergence which, thanks to the many transfers or ways of interconnection, triggered the international character of the *Institución Libre de Enseñanza* and its fruit. In this educational convergence, the resulting nucleus is the identity of the institution itself, where there was a European renewed pedagogy which generated a groundswell of innovation in Spain. Such circumstances facilitated the development of the institution itself, which was represented by the creation of various bodies or pedagogical, educative, pro-research initiatives. In this paper, we have analyzed the cases of the Bulletin of the *Institución Libre de Enseñanza*, the National Pedagogical Museum, the JAE and the male and female students' Residence.

We have seen the fruits of convergence as well as the roles and positions of the protagonists of this phenomenon. However, implicitly, the value of the transfer has been also shown. We are referring to the mechanisms and instruments for the confluence of personalities or forms of European and Spanish thought. Although the connections were mainly European, it is necessary to note that the transfer and influence crossed the Atlantic Ocean, with an important influence of the democratic, urban and technological model of the United States, in which the institutionalists watched with attention their educational and civic achievements, which generated from the beginning of the twentieth century a large number of diverse professionals, who began to travel to the United States in search of new formulas to improve their performance and effectiveness, especially driven and favored by the actions of the JAE in its attempt to form an intellectual elite, competent scientifically and adapted to the new times, that served for the modernization of Spain, through the collaboration and exchange of scientific and educational ideas with the United States, which generated several visible results in the link between the Residence of Young Ladies and the International Institute, the Institute of the Spanish of New York, the Foundation of Amo (1929), and the visit of a group of Spanish scholars advised by the Rockefeller Foundation to US universities⁷⁸.

The connection between Spain and countries like Germany, England, France, Belgium, Italy, Portugal, among others; between Francisco Giner, Manuel B. Cossío, Castillejo, etc. with Krause, Ahrens, Tiberghien, Rousseau, Froebel, Pestalozzi, Wundt, Coubertin, etc., has taken place in a synchronous

⁷⁸ D. Fernández de Miguel, *Los recelos a la modernización al estilo norteamericano en España*, «Historia y Política», n. 34, 2015, pp. 81-111.

and asynchronous way, through scholarships or pensions, travel, attendance at conferences, stays, visits, writing, translating, editing and reading of works, implementation of institutional initiatives, watching schools, knowledge of multiple languages or epistolary communication. All accompanied by various junctures of the historical moments of the political, ideological, religious and cultural movements or economic circumstances of each country. Thus, issues such as the Revolution of 1868 in Spain, or the First World War in Europe, among others, affected the nature and action of these transfers. The detailed analysis of these transfers would mean conducting a parallel study of interesting nuances, but which would certainly be needed for not forego analysis which addresses all common symbiosis that would demonstrate the impact and influence of European culture and education on cultural Spanish practices beyond transfer; an incipient process of transculturation. Whereupon, this study opens a new line here or way forward, to analyze transfer mechanisms concisely, opening the possibility of a greater understanding of the convergent phenomenon studied here.

Le figure-chiave del successo della produzione per l'infanzia della SEI nel periodo tra le due guerre

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The key figures in the success of SEI children's production in the interwar period

ABSTRACT: The article aims to highlight the role of two key figures who greatly contributed to the success of the children's production of the Turin Catholic publishing house SEI in the years between the two world wars. They are Francesca Castellino and Giuseppe Fanciulli, authors very different from each other but both capable of acting as cultural promoters and organizers, calling to work in SEI primary level writers. Through the use of primary sources as SEI catalogs, Salesian Bulletin, specialized magazines of the period, it is therefore intended to highlight the characteristics and roles of these two figures who in that specific historical period are also the only two directors of children's series of the SEI.

EET/TEE KEYWORDS: Children's literature; Catholic publishing house; Francesca Castellino; Giuseppe Fanciulli; Italy; XXth Century.

La SEI, come è noto, è la storica casa editrice fondata da don Bosco a Torino nella seconda metà dell'Ottocento con lo scopo di diffondere la buona stampa educativa e istruttiva¹. Il nome degli esordi, Libreria Editrice Salesiana, diventa

¹ Sulla storia della casa editrice SEI: F. Traniello (ed.), *Don Bosco nella storia della cultura popolare*, Torino, SEI, 1987; F. Rizzini, *Don Bosco tipografo ed editore*, «Rassegna CNOS», n. 2, 1988, pp. 57-85; G. Ragone, *Le lettere industriali. Editoria, letteratura e comunicazione*, in A. Asor Rosa (ed.), *Letteratura italiana, storia e geografia*, Torino, Einaudi, 1989, Vol. III, pp. 1060-1061; S. Pivato, *I nipotini di don Bosco*, in Id., *Clericalismo e laicismo nella cultura popolare italiana*, Milano, FrancoAngeli, 1990, pp. 15-65; G. Chiosso, *Libri, editori e scuola a Torino nel secondo Ottocento*, «Annali di storia dell'educazione», vol. 4, 1997, pp. 85-116; F. Traniello, *L'editoria cattolica tra libri e riviste*, in G. Turi, *Storia dell'editoria nell'Italia contemporanea*, Firenze, Giunti, 1997, pp. 29-320; G. Chiosso, *Oratorio di S. Francesco di Sales*, in Id. (ed.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, Milano, Bibliografica, 2003,

SAID Buona Stampa a inizio Novecento per poi trasformarsi definitivamente nel 1919 in SEI. A partire da questa ultima fase di consolidamento dell'identità dell'editrice inizia un periodo di grande fioritura che porta gli anni Venti ad essere definiti come "periodo d'oro" della SEI grazie ai suoi successi in particolare nel settore della produzione di manuali scolastici. In realtà, seppur si tratti di un aspetto finora poco noto, a contribuire a questo periodo di sviluppo e conquista del mercato è certamente il settore dedicato alla letteratura amena per l'infanzia. L'editrice salesiana infatti, che già a partire dal 1896 aveva mostrato attenzione verso questa fascia di pubblico attraverso l'avvio della collana "Letture amene e Educative", si indirizza con sempre maggior vigore verso la letteratura per l'infanzia avviando proprio negli anni Venti ben sette nuove collane per bambini e ragazzi.

Numerosi sono i nomi degli autori chiamati a contribuire a questi progetti e certamente non di second'ordine se pensiamo a collaboratori quali Pezzani, Dandolo, Visentini, Dadone, Cuman Pertile, Drovetti, Provenzal, Paolieri e molti altri, ma due in particolare sembrano coloro che hanno avuto un ruolo catalizzatore, come veri e propri *dei ex machina* capaci di organizzare progetti editoriali, dirigerli, raccogliere attorno a sé collaboratori ritenuti adatti ai differenti scopi, creando una sorta di "scuola" che si riversa concretamente nella produzione per l'infanzia SEI. Si tratta di Francesca Castellino e Giuseppe Fanciulli. Può essere dunque interessante indagare il loro rapporto con la SEI non tanto rispetto al contenuto delle opere pubblicate con questa editrice, aspetto che peraltro è già stato ampiamente studiato, bensì rispetto al loro ruolo all'interno della casa editrice, alle loro scelte e al rilievo che l'editrice stessa riserva a questi due "organizzatori culturali" della produzione per l'infanzia SEI.

In assenza di un archivio storico della casa editrice che possa aiutarci in tal senso, è possibile provare a studiare questi aspetti attraverso lo spoglio delle riviste dell'epoca dedicate all'editoria, in particolare l'organo salesiano ufficiale rappresentato dal Bollettino Salesiano, e dei pochi cataloghi editoriali SEI del periodo che si sono salvati dalla dispersione, i quali rappresentano oggi una fonte certamente parziale ma altrettanto diretta e significativa dell'espressione del pensiero e della politica dell'editrice.

pp. 399-401; F. Targhetta, *La capitale dell'impero di carta: editori per la scuola a Torino nella prima metà del Novecento*, Torino, SEI, 2007 (specificamente le pagine 91-176); Id., *Serenant et illuminant. I cento anni della SEI*, Torino, SEI, 2008; R. Sani, *L'editoria scolastica cattolica dall'età giolittiana al fascismo. Il caso della Sei di Torino e dell'Editrice La Scuola di Brescia*, in A. Zuczkowski, I. Bianchi (edd.), *L'analisi qualitativa dell'esperienza diretta. Festschrift in onore di Giuseppe Galli*, Roma, Aracne Editrice, 2009, pp. 493-512.

1. Francesca Castellino: la “mamma” capace di tessere relazioni

Nata a Firenze nel 1884, Francesca Castellino si trasferisce a Torino, dove si laurea in lettere nel 1908, due anni dopo aver sposato Onorato Castellino, educatore, scrittore, giornalista e critico². Parallelamente alla sua carriera di insegnante si avvicina alla scrittura, campo in cui riscuote fin dal 1915 giudizi lusinghieri: «possiede pregi di cultura tali da farle imprimere di sé orme indelebili nel campo delle lettere»³. Possiamo far risalire gli esordi della Castellino come scrittrice al 1912, quando inizia a pubblicare – con lo pseudonimo di Francesca Fiorentina – commedie e vaudeville, genere che non abbandonerà nel corso della sua carriera dedicandosi al teatro per bambini e per ragazzi nell’ambito delle operette educative, legate in particolare agli Oratori salesiani. L’anno successivo approda in quella che allora era ancora nominata SAID Buona Stampa, editrice con cui collaborerà fino al 1961, in un rapporto lungo quasi cinquant’anni, con la realizzazione di ben quarantasette opere.

Dopo i primi brevi racconti editi con SAID, uno dei primi lavori realizzati con l’editrice torinese a seguito della trasformazione in SEI nel 1919 è *Così va il mondo*, una raccolta di novelle in realtà non datata ma presente sulle pagine promozionali del Bollettino Salesiano dell’ottobre 1919. La stesura del libro risale agli anni del primo conflitto bellico quando la Castellino insegnava a Oneglia, come ben mostra la dedica «alle mie alunne e ai miei alunni del Regio Ginnasio di Oneglia: questi racconti nati spontaneamente negli anni di guerra per allietarli ed educarli»⁴. Si tratta di un corposo volume di 293 pagine con 29 novelle di contenuto morale, volte ad educare i giovani ai valori della carità, del risparmio, della fratellanza e impreziosito da illustrazioni in bianco e nero al tratto di Marina Battigelli. I temi sono trattati ricorrendo ai ricordi dei nonni e al loro rapporto con i nipoti, privilegiando il dialogo diretto e serrato e il racconto breve. I buoni sentimenti hanno sempre la meglio e anche quando si commettono scorrettezze (ad esempio nel racconto *Il cane della canestraia* il giovane Nino avvelena l’aggressivo cane della vicina) prevale il pentimento e la comprensione di una “lezione morale” che accompagnerà poi il giovane nell’arco della sua vita. La SEI, per esaltare il contenuto del volume, lo presenta sottolineando come questi racconti siano «più vivi di quelli del Thouar e del Tarra e, come quelli, molto educativi»⁵, mostrando come i paradigmi di riferimento siano ancora ottocenteschi. In effetti la Castellino scrittrice non si distingue affatto per originalità dei contenuti: accanto a manuali di galateo per ragazzi e libri scolastici (in cui spazia da testi di grammatica ad antologie di brani

² G. Casati, *Scrittori cattolici italiani viventi. Dizionario bio-bibliografico ed indice analitico delle opere*, Milano, Romolo Ghirlanda, 1928, p. 17.

³ C. Villani, *Stelle femminili. Dizionario bio-bibliografico*, Napoli, Soc. Ed. Dante Alighieri, 1915, p. 306.

⁴ F. Castellino, *Così va il mondo*, Torino, SEI, [1919?].

⁵ *Bollettino Salesiano*, ottobre 1919.

scelti, traduzioni dell'*Odissea*, corsi di storia, di economia domestica, compiti per le vacanze, riedizioni dei *Promessi Sposi*), la sua produzione ha sempre come fulcro tematico la figura femminile intesa in maniera assai tradizionale, dove la bambina e la ragazza sono angeli del focolare, bene educate e ottime amministratrici domestiche, attente a non lasciarsi distrarre dalle tentazioni del lusso o dell'eccessiva libertà⁶. Non è un caso che Olga Visentini nel suo libro sulla letteratura giovanile inserisca la Castellino nella sezione dedicata a "scrittrici intorno al focolare", sottolineando il richiamo costante della scrittrice alla famiglia⁷. Quello che interessa particolarmente in questa scrittrice dunque non sono i temi o le opere letterarie in sé, quanto piuttosto le capacità che in qualche modo possiamo chiamare imprenditoriali. Nonostante infatti questa visione conservatrice, la Castellino non solo difende i diritti delle donne, il loro impegno nel lavoro, la partecipazione alla vita politica (come testimonia anche un suo articolo del gennaio del 1946 sulla rivista «Alba», in cui rassicura coloro che sono scettici riguardo alla partecipazione attiva delle donne in politica e al loro diritto di voto)⁸, ma è la stessa vita della scrittrice che mostra quanto ritenga importante la conciliazione tra l'impegno lavorativo e quello che ritiene l'imprescindibile ruolo di madre e moglie: proprio con il marito Onorato Castellino, infatti, con cui condivide il medesimo editore SEI e diversi progetti culturali, crea un sodalizio lavorativo fondando nel 1922 la rivista per ragazzi «Cuor d'Oro». Il progetto, che avrà vita fino al 1927, è capace di richiamare a sé i più significativi illustratori dell'epoca (Mussino, Golia, Quaglino, De Abate, Pompei per citarne alcuni) e autori quali Giovanni Bertinetti, Giovanni Drovetti, Carlo Dadone, Saverio Fino, Luigi di San Giusto (Luisa Macina Gervasio), Renzo Pezzani, Angiolo Silvio Novaro, Vittorio Emanuele Bravetta, di cui venivano pubblicati romanzi a puntate o racconti. Non può passare certamente inosservata la pressoché totale sovrapposizione tra nomi di autori e illustratori coinvolti in «Cuor d'Oro» e i nomi dei collaboratori della SEI del medesimo periodo, in un continuo scambio tra coloro che già collaboravano con l'editrice, poi "imprestati" alla rivista, e viceversa.

Il legame diretto tra la rivista e la SEI, d'altra parte, è testimoniato anche dal fatto che fin dal primo numero «Cuor d'Oro» indice un concorso per reperire nuovi racconti, e i membri della giuria sono il cavalier Caccia, il cavalier Gigi Michelotti e Saverio Fino, rispettivamente direttore generale della SEI il primo e prolifici autori SEI gli altri. È evidente come la Castellino non sia soltanto una collaboratrice occasionale della SEI ma ci sia con la casa editrice un rapporto personale e professionale più diretto e più solido che va oltre la sola pubblicazione delle sue opere. All'interno di «Cuor d'Oro» emerge bene il ruolo

⁶ Cfr. F. Castellino, *Prefazione*, in L. Di San Giusto, *La sorte migliore*, Torino, SEI, 1930.

⁷ O. Visentini, *Libri e ragazzi: storia della letteratura infantile e giovanile*, Milano, Mondadori, 1936, p. 233.

⁸ Cfr. M. Fugazza, S. Cassamagnaghi, *Italia 1946: le donne al voto. Dossier*, Milano, Istituto Lombardo di Storia contemporanea, 2006.

centrale della Castellino, unitamente alle sue doti comunicative e organizzative: è presente con suoi racconti e poesie ma in particolare il suo compito è quello di mantenere il rapporto diretto con i giovani lettori. È infatti titolare di una rubrica la cui importanza strategica è evidenziata non solo dall'essere inserita su pagine di colore rosa per distinguerla rispetto al resto degli scritti ma anche per la scelta, in occasione della prima uscita della rivista nel marzo 1922, di presentare questa rubrica ancor prima del progetto editoriale globale, dedicando ad essa e quindi al ruolo della Castellino stessa una posizione di primaria importanza. D'altra parte anche il contenuto proposto dalla Castellino in questo spazio e lo scopo che si prefiggeva di raggiungere attraverso di esso è davvero strategico: rivolgendosi direttamente ai giovani lettori e firmandosi come "Mammina", l'autrice prima entra in confidenza con i suoi interlocutori per poi chiedere loro di portare nuovi lettori, di coinvolgere amici e parenti nella diffusione della rivista e del suo numero di abbonati⁹:

Ma sì cari, avvicinatevi pure a Mammina, domandatele tutto quel che volete, apritele il vostro cuore, come...come se fosse una seconda mammina vostra: lei vi stenderà le mani, vi risponderà, vi capirà, proprio come una mamma. Se vi vuol già un mondo di bene! Vogliategliene anche voi, che le darete tanta gioia e cercate d'essere in tanti. Come dovete fare? Ciascuno di voi deve cercare uno, due, tre, dieci abbonati: così vi crescerà il numero di fratelli e vi troverete meglio in compagnia. Mammina premierà il vostro zelo. In che modo? Non ci ha ancora pensato ma ci penserà. C'è tempo, vero? E cercherà di farvi tutti contenti¹⁰.

Questa astuzia della Castellino e questo suo desiderio di creare con il lettore un rapporto di fiducia tale da assomigliare al legame madre-figlio viene portato anche all'interno della SEI, come mostra per esempio il *Libro di Nanni* (SEI, 1922) in cui l'autrice dà alle stampe i suggerimenti e le regole che aveva messo a punto per suo figlio Nanni, permettendo idealmente al lettore di entrare nell'intimità della sua famiglia.

La condivisione tra la SEI e l'autrice di una medesima visione dello spirito educativo e di una visione cattolica della vita, d'altra parte, è esplicitata anche dall'appartenenza di quest'ultima a circoli cattolici e alla adesione dal 1925 alla torinese Società Autori Cattolici di cui suo marito era presidente¹¹. Sempre nel 1925 la Castellino assume un nuovo ruolo all'interno dell'editrice torinese, divenendo direttrice di una collana per ragazzi. Si tratta di un ruolo assolutamente significativo se si considera che si tratta della prima e unica

⁹ Come è noto, l'*escamotage* di presentarsi ai giovani lettori come dolci e affidabili "parenti" quali mamme o zie con cui stringere un rapporto diretto fatto di condivisione e richieste reciproche è assai diffuso nell'ambito della produzione per l'infanzia, in particolare della pubblicistica o di iniziative di promozione della lettura, come mostra il celebre caso di zia Mariù.

¹⁰ «Cuor d'Oro», anno I, n. 1, 1922.

¹¹ «Ragguaglio dell'attività culturale e letteraria dei cattolici in Italia», vol. I, 1930, pp. 191-193.

donna che, per tutta la storia della produzione per l'infanzia SEI, dirigerà una collana¹².

La collana in questione è "Il Fiore", attiva fino al 1932, dedicata alle ragazze e specificamente volta alla diffusione della buona stampa educativa cattolica, contro l'imperante volgarizzazione dei costumi e della moralità. I libri della collana vogliono combattere «l'orrore della volgarità, tanto nelle opere quanto nei sentimenti e negli affetti» e contribuire a far sorgere «nei campi dell'arte il libro buono, il libro che non solo non faccia del male ma faccia anche del bene. Lo reclama la gioventù... ne ha bisogno come dell'aria e del sole, la gioventù femminile. [...] La signorina moderna è diventata un essere pericoloso e mostruoso»¹³.

La Castellino con questa collana vuole coltivare «i fiori che si addicono alla bontà, alla serenità, alla gioia, alla giovinezza cristiana»¹⁴ e intende difendere la bontà dei libri per l'infanzia della SEI, sottolineandone la distanza

dai romanzi francesi che hanno celebrato la *garçonne*, da certi romanzi italiani che hanno iniziato la giovinetta alle malsane curiosità di vita mondana, che ne hanno violato il pudore aprendo le cortine dell'alcova, che ne hanno affrettata la corruzione deridendo la purezza e la santità del costume. L'esempio anglosassone della *girl* indipendente e autonoma parve, a un certo punto, il non *plus ultra* della modernità, ma il modello nordico, ritagliato nella stoffa delle precoci e sensitive meridionali, ha prodotto campioni di giovinetta che poche madri vorrebbero amiche e compagne delle loro figlie¹⁵.

È facile comprendere come i contenuti dei romanzi presenti in collana non apportino novità di rilievo nel panorama della letteratura per l'infanzia, restando ancorati alla diffusione di «legge del dovere, [...] senso religioso della vita, [...] sottomissione al divino [che] sono l'antecedente necessario di ogni arte»¹⁶. Al contrario appare significativo come anche l'opportunità di dirigere una collana venga utilizzata da Castellino per cooptare all'interno della SEI nuovi autori. Alla sua iniziativa si deve l'avvio della collaborazione con Ada Cagli della Pergola, in arte Fiducia. Quest'ultima (Ancona, 1859 - Roma, 1941) era ormai una scrittrice più che affermata grazie anche ai suoi scritti pubblicati nella "Bibliotechina della Lampada" di Mondadori e nella "Biblioteca per ragazzi" di Bemporad e viene coinvolta all'interno della collana "Il Fiore" attraverso una raccolta di novelle non prive di brio e stile scorrevole, ma appesantite dall'intento moraleggiante. Discorso simile si può applicare a un ulteriore contatto avviato dalla Castellino, Ettore Allodoli (Firenze, 1882-1960), docente di letteratura italiana presso la

¹² Differente sarà negli anni Ottanta del Novecento il ruolo di Carmen d'Andrea che, sotto il marchio Varia SEI, avrà posizioni di rilievo in collane per ragazzi ma sempre collegati per lo più al suo ruolo di stretta collaboratrice del direttore don Meotto.

¹³ F. Castellino, *Prefazione*, in L. di San Giusto, *La sorte migliore*, Torino, SEI, 1930.

¹⁴ *Prefazione alla Collana*, in F. Castellino, *La lampada cheta*, Torino, SEI, 1925.

¹⁵ *Ibid.*

¹⁶ Catalogo SEI, 1928, p. 16.

Facoltà di Architettura di Firenze, prolifico autore di manuali scolastici che, a differenza dei suoi contenuti tradizionali¹⁷, all'interno de "Il Fiore" tratta le vicende sentimentali di due innamorati che la sorte divide fino a quando «Dio li condurrà a ritrovarsi sullo stesso sentiero, li farà procedere insieme entro lo stesso raggio di letizia, verso la vita»¹⁸. Ulteriore contatto avviato da Castellino è quello con Olga Malaguzzi Antonelli (Venezia, 1893 - Brescia, 1965), nota anche con lo pseudonimo di Paolo Omarez¹⁹, collaboratrice de «Il Corriere dei Piccoli», a cui la accomunano i temi e l'interesse per il teatro educativo.

Tutti e tre questi nuovi nomi della produzione SEI, dopo questa prima esperienza nel progetto diretto da Castellino, continueranno la loro collaborazione con l'editrice.

La collana "Il Fiore" contiene anche due scritti di Castellino stessa: una raccolta di racconti intitolata *La lampada cheta* e un romanzo *La bottega della regina*. Quest'ultimo pur non conoscendo ristampe viene presentato ancora nel catalogo del 1942 risottolineando proprio quella caratteristica principale della scrittrice fin dai tempi dei suoi esordi in SEI, che ha costituito una sorta di *fil rouge* della sua intera produzione:

L'Autrice è la mamma un po' ritratta nell'ombra ma vigile e presente a ogni pensiero della figliola, ad ogni sua azione, così pacata, così amorosa nello studiarne le giovanili ansie, così tenera nel confortarne i passeggeri sconforti. È la *mamma* che scrive. Con la sapienza della sua sapienza di vita vissuta, il suo cuore solido di virtù come un castello e le sue parole illuminate²⁰.

L'opera della Castellino, trascurata dalla critica odierna, non trova in realtà molto spazio neppure nei manuali critici di letteratura per l'infanzia del passato: Fanciulli, pur collega alla SEI, le dedica poche righe ponendo l'accento sulla «chiara costruzione ed eccellente lingua»²¹, mentre Olga Visentini, anch'essa collega, sottolinea in lei principalmente la produzione di «care fiabe di tradizione e di opere teatrali»²². La qualità di queste ultime in realtà non pare sempre omogenea e di rilievo, stando al giudizio della Commissione Centrale per l'esame dei libri di testo che parla anche della presenza di qualche «materiale scadente»²³.

¹⁷ I. Vaglini, *Ettore Allodoli*, in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'educazione*, Milano, Editrice bibliografica, 2013, Vol. I.

¹⁸ E. Allodoli, *A guisa di stella*, Torino, SEI, 1926, p. 6.

¹⁹ M. Gastaldi, *Donne luce d'Italia*, Pistoia, Grazzini, 1930, p. 418.

²⁰ Catalogo SEI, 1942, p. 116.

²¹ G. Fanciulli, E. Monaci Guidotti, *La letteratura per l'infanzia*, Torino, SEI, 1926, p. 281.

²² O. Visentini, *Libri e ragazzi: sommario storico di letteratura infantile*, Milano, Mondadori, 1933, p. 234.

²³ A. Ascenzi, R. Sani (edd.), *Il libro per la scuola tra idealismo e fascismo: l'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiori, 1923-1928*, Milano, V&P, 2005, p. 677. Il giudizio è riferito in questo caso al volume della Castellino *Oggi teatro*, edito da Paravia.

Indubbiamente più che la Castellino scrittrice è stata la Castellino “organizzatrice culturale” a offrire un significativo contributo allo sviluppo della letteratura per l’infanzia SEI. La sua figura incarnava perfettamente i valori educativi e morali, così come gli obiettivi, che l’editrice si poneva fin dalla sua nascita come tipografia salesiana. Nel contempo Castellino però sapeva essere non solo autore dalla testa china sulla propria produzione, come lo erano state altre figure della produzione per l’infanzia SEI (un nome su tutti, Ugo Mioni), bensì risultava capace di guardarsi attorno e tessere relazioni. In qualche modo, pur nel suo conservatorismo tematico, Castellino ha saputo rappresentare una figura nuova nel contesto della produzione per l’infanzia SEI del periodo.

2. Giuseppe Fanciulli: ottimo “tessitore”, solido lasciapassare

Se ben nota è la figura di Fanciulli (Firenze, 1881 - Castelveccana, 1951) tanto da non necessitare di presentazioni introduttive, forse meno noto è il suo rapporto con l’editore torinese²⁴. La collaborazione inizia nel 1918 quando da ben dodici anni aveva incontrato la letteratura per l’infanzia e da cinque la produzione di manuali scolastici, passando per la scoperta di una vera e propria passione per il teatro per ragazzi e la presenza in svariate riviste non solo dedicate ai più giovani. Sono proprio gli anni a ridosso della Prima Guerra mondiale, e in particolare la perdita in guerra dell’intimo amico Giosuè Borsi con la conseguente profonda crisi religiosa, che vedono in qualche modo preparare il terreno personale e umano entro cui si andrà a collocare la collaborazione con la SEI. È infatti in questo periodo che si chiarisce «l’orientamento ideale e politico dello scrittore e il contesto ideologico e culturale in cui andranno ad iscriversi le opere del nuovo corso, quella produzione (novelle, teatro, romanzi) che lo stesso Fanciulli presenterà come frutto di un *trapasso*, come il risultato di un cambiamento radicale che ha visto, irrimediabilmente, il prima e il dopo di una generazione e di una nazione»²⁵.

L’approdo di Fanciulli alla SEI, quando ancora si chiamava SAID, avvia una collaborazione che proseguirà per quasi quarant’anni dando vita a un rapporto di fiducia, successi e progetti condivisi. Accanto a novelle e romanzi, saranno anche libri scolastici e testi di teatro educativo a occupare una parte importante della produzione scaturita dal rapporto tra la SEI e Fanciulli, che annovera in totale ben 51 opere. Diversi testi pensati come libri di lettura scolastici (*Creature*,

²⁴ Alcuni riferimenti dedicato al rapporto tra Fanciulli e l’editrice cattolica torinese si trovano in Targhetta, *Serenant et illuminant*, cit.; P. Vagliani (ed.), *Serenant et illuminant: i grandi libri illustrati per l’infanzia della SEI (1908-2008)*, Torino, SEI, 2008; D. Montino, *Le tre Italie di Giuseppe Fanciulli: educazione e letteratura infantile nel primo Novecento*, Torino, SEI, 2009.

²⁵ A. Michieli, *Giuseppe Fanciulli*, Rovigo, Ist. Padano di Arti Grafiche, 1954, p. 129.

Gente nostra, per esempio), trovano spazio in realtà anche nei cataloghi di letteratura amena dell'editore torinese, divenendo più genericamente libri di lettura.

La casa editrice così descrive il suo autore nei primi anni del loro rapporto: «lo scrittore toscano nelle sue pagine sparge da gran signore la sua parlata viva e gaia; però è un gran signore di buon gusto, nemico del lusso sfacciato! [...] Fortunati noi, condannati un tempo ad annoiarci su così detti classici...molto noiosi»²⁶.

La prima opera edita con la casa torinese è *Creature*, un libro di particolare significato nella vita di Fanciulli, il primo realizzato dopo la sua conversione religiosa che segna il passaggio a una nuova stagione creativa. Fanciulli stesso ne è consapevole: «la guerra, la perdita di un fraterno amico, Giosuè Borsi, la vita in una casa mia a fianco di colei che ne è stata ed è la cara compagna ispiratrice, determinarono un ritorno alla pura fede e alla pratica cristiana di mia madre. Da ciò un nuovo avviarsi per la strada dell'arte. Bisognava rifarsi da principio e *Creature* segna il trapasso»²⁷.

Questa raccolta di novelle impregnate dalla natura, il mistero della creazione, dalle bellezze del creato viene giudicata dalla SEI di «squisita fattura»²⁸ e «libro bellissimo nel quale la vita della natura palpita nelle descrizioni artistiche; vi sono fierezze di osservazione, felici intuizioni di verità scientifiche, varietà di toni in viva armonia di insieme»²⁹. Proprio questo volume di avvio del rapporto tra Fanciulli e la SEI, che peraltro venderà 33.000 copie, è quello che segna la nascita di un interesse della critica letteraria coeva verso l'autore: Emilia Formigginì Santamaria, ignorando tutta la sua produzione precedente se non quella in qualità di psicologo, recensisce l'opera per «L'Italia che scrive»³⁰. In qualche modo è come se il beneficio del rapporto tra SEI e Fanciulli fosse reciproco: l'editrice si può pregiare di un nome già noto che assicura successo di vendite e Fanciulli inizia ad essere riconosciuto anche dalla critica.

Anche il coevo *Gente nostra* (1918) e il successivo *Alla Sorgente* (1921), possono essere visti come parte di un medesimo ciclo, entrambi raccolte di novelle, con riferimenti alla guerra e alla Toscana, i cui protagonisti sono «gente umile e discreta, sottile per civiltà ereditata da secoli, allegra per la salute del corpo e dell'ingegno, elevata nell'amore del focolare, della terra natale, della Croce»³¹. Nel Fanciulli autore di queste novelle prevale il gusto per il contado, per la serenità della vita legata ai valori veri, per un po' di nostalgia per la sua terra natale. Sono i valori cari alla SEI, in cui l'autore si inserisce

²⁶ Bollettino Salesiano, febbraio 1922.

²⁷ Introduzione a *Creature*, in *ibid.*, p. 62.

²⁸ Commissione ministeriale per l'esame dei libri di testo del 1924

²⁹ Ascenzi, Sani (edd.), *Il libro per la scuola tra idealismo e fascismo*, cit., p. 459.

³⁰ S. Fava, *Percorsi critici di letteratura per l'infanzia tra le due guerre*, Milano, Vita e Pensiero, 2004, p. 182.

³¹ Catalogo SEI, 1942, p. 41.

perfettamente, come ci conferma il Bollettino Salesiano del gennaio 1922 che presenta trionfalmente *Alla sorgente*³²:

Dopo aver ristampato *Gente nostra* [...], Giuseppe Fanciulli offre agli studenti delle scuole medie un po' più alte (quarta e quinta ginnasiale, normali, Istituto tecnico, ecc.), raccolte in un volume intitolato ALLA SORGENTE altre novelle non meno gustose. [...] *La sorgente?* È l'antica tradizione delle più sane famiglie nostre, la quale a un certo punto nel libro diventa un... sole, una fiamma³³.

Questo avvio di collaborazione nel segno delle novelle prosegue nell'opera del 1922 *Come sono felice!*, che modifica però il soggetto per lasciarsi andare a una «vena di tenerezza fantastica e di grande capacità espressiva»³⁴. Il libro viene giudicato dalla Commissione Vidari «veramente delizioso, alla cui armonia artistica concorrono l'edizione, le illustrazioni, la sapiente arte del narratore che mostra di conoscere e interpretare mirabilmente l'animo infantile»³⁵. Il giudizio chiama in causa anche l'editore, elogiandone le scelte di formato e di grafica e l'illustratore: si tratta in questo caso di un felicissimo intervento di Filiberto Mateldi che presenta fin dalla copertina bimbi sorridenti, pasciuti, divertiti e divertenti, e accompagna perfettamente il testo andando a confezionare quello che possiamo definire un buon prodotto editoriale, ristampato poi fino al 1951.

Fanciulli quando approda alla SEI non è certamente un autore esordiente ma in ogni caso è significativo come bastino davvero pochi anni per consolidare un rapporto fiduciario che si allarga dal 1924 anche alle produzioni antologiche per le scuole (*Fonte viva*) e al teatro (*Il nostro tesoro e altre commedie* e *Teatrino della scuola*). Sono i medesimi anni in cui, dal 1921, Fanciulli diventa anche direttore di quella rivista che l'aveva accolto ai suoi esordi e in qualche modo formato, «Il Giornalino della Domenica», da cui viene di fatto esautorato nel 1924. Potrebbe non essere del tutto casuale che l'assegnazione di un ruolo di maggiore responsabilità in SEI avvenga proprio subito dopo la fine del suo impegno alla direzione del giornalino milanese avvenuta appunto il 31 dicembre 1924. D'altra parte è noto quanto Fanciulli desiderasse in realtà mantenere il suo ruolo di direttore o quanto meno vedersi riconosciuto un valore nell'ambito della produzione per ragazzi che lui sentiva in questi anni di aver già maturato, in particolare grazie all'esperienza a seguito di Vamba³⁶. Proprio a partire dal 1925 la SEI affida a Fanciulli la direzione di suoi interi progetti editoriali

³² Il libro viene indicato con il titolo *La sorgente*, invece che *Alla sorgente*, dalla Commissione Vidari per l'esame dei libri di testo del 1925, che lo approva. Cfr. Ascenzi, Sani (edd.), *Il libro per la scuola tra idealismo e fascismo*, cit., p. 459.

³³ Bollettino Salesiano, gennaio 1922.

³⁴ P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 1995, p. 184.

³⁵ Ascenzi, Sani (edd.), *Il libro per la scuola tra idealismo e fascismo*, cit., p. 459.

³⁶ D. Montino, *Giuseppe Fanciulli negli anni de «Il Giornalino della Domenica»*. *Infanzia, giornalismo e politica*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 305-318.

rivolti al pubblico più giovane. Nel contempo accanto al suo ruolo di autore per l'infanzia e di direttore di collana, all'interno della SEI Fanciulli si sente libero di proseguire le sue riflessioni legate alla laurea in psicologia (nel 1925 pubblica con l'editore torinese *Il fascino dell'infanzia: studi e note di psicologia*) e di sviluppare i suoi interessi nell'ambito della critica letteraria dando alle stampe nel 1926 con Enrichetta Monaci Guidotti il volume *La letteratura per l'infanzia*. Possiamo affermare che a circa sette anni dai suoi primi rapporti con la casa editrice torinese, Fanciulli ha già stretto un forte sodalizio con l'editrice salesiana, in cui può esprimersi a tutto tondo rispetto ai suoi interessi e alle sue competenze, ottenendo fiducia e visibilità da parte dell'editore. Non è un caso che sempre in questi anni decida di ristampare proprio con la realtà torinese due sue opere che avevano visto precedentemente la luce con Vallecchi (*Lascio ai miei figli*) e con Bemporad (*Il castello delle carte: novelline bizzarre*).

A conferma del consolidamento del suo ruolo di "leader" della produzione per l'infanzia SEI, il catalogo del 1926 gli offre la visibilità dell'intera retrocopertina del catalogo in cui vengono riassunte tutte le sue opere realizzate fino a quel momento con l'editore torinese³⁷.

Sono gli anni in cui il ruolo di autore di fiducia e di direttore di collana, permette a Fanciulli di divenire anche una sorta di "procacciatore di scrittori" per l'editrice torinese. È lui infatti che chiama a collaborare con la SEI persone che aveva conosciuto in altri contesti come per esempio Milly Dandolo, apprezzata collaboratrice de «Il Giornalino della Domenica» che avvia l'attività con l'editore torinese pubblicando proprio una raccolta di racconti già apparsi a puntate sul giornale di Vamba. Fanciulli all'interno della SEI assumerà sempre in qualche modo un ruolo di protezione verso la Dandolo, contribuendo in qualità di membro della Giuria, a farle assegnare su 98 concorrenti il premio del primo concorso SEI che cercava «un volume concepito con spirito di eletta poesia e scritto con mirabile nitidezza di stile»³⁸, trovandolo appunto in *Cuore in cammino* (1930).

Il ruolo di Fanciulli come "procacciatore di autori" per la SEI non si esaurisce certamente con Milly Dandolo: sempre lui porta all'editrice torinese dal 1926 Camilla Del Soldato che aveva conosciuto fin dal 1921 sempre tramite la comune attività presso «Il Giornalino della Domenica» (il 1926 è il medesimo anno in cui, in una sorta di scambio di favori, Fanciulli pubblica il suo romanzo per bambine *Il più bello di tutto* all'interno della collana "Biblioteca delle Giovani italiane" diretta proprio dalla Del Soldato per Le Monnier).

Conoscenze di Fanciulli provenienti da «Il Giornalino della Domenica» sono anche Aldo Valori che con la SEI realizzerà una lunga serie di manuali scolastici e Dino Provenzal che collabora dal 1919 alla rivista diretta a partire dall'anno successivo da Fanciulli stesso, a cui sembra legarlo un rapporto di

³⁷ Catalogo SEI, 1926.

³⁸ Bollettino Salesiano, ottobre 1931.

stima professionale come testimonia l'inserimento di sue opere nella collana diretta da Fanciulli e il carteggio di molti anni dopo in cui Fanciulli invia sue opere a Provenzal chiedendo di recensirle³⁹.

Tra gli autori SEI più significativi del periodo, diverso è il caso di Ernesto Nuccio, apprezzato esponente del realismo narrativo. In realtà quella di Nuccio è solo un'incursione, con la pubblicazione nel 1923 del testo *Il reuccio degli uccelli*, peraltro già comparso a puntate su «Il Giornalino della Domenica». Tale collaborazione può rientrare più che altro nell'ambito di un gesto di amicizia di Nuccio verso Fanciulli, piuttosto che di un vero e proprio legame con la casa editrice torinese.

Questo gruppo di autori appartenenti in qualche modo alla "scuola lombarda" e chiamati a Torino anche per rispondere all'esigenza di dotarsi di solide firme capaci di superare l'esame della nuova Commissione centrale per l'esame dei libri di testo nata dopo il 1923⁴⁰, sembrano appunto passare tutti in qualche modo attraverso la conoscenza di Fanciulli, che in svariati casi scriverà con loro libri a quattro mani o li chiamerà all'interno di collane da lui dirette.

Contatto romano di Fanciulli è invece Mario Pucci (Roma, 1922 - Torino, 2016), allora alle sue prime esperienze di scrittore, chiamato a redigere a quattro mani un corso di letture per le scuole elementari, *Primestelle* (1949), e poi rimasto solidamente legato alla SEI per cui dirigerà diverse collane per ragazzi.

Approfondendo il ruolo di Direttore di collane ricoperto da Fanciulli in SEI, la prima ad essergli affidata è "Le vite dei santi narrate ai giovani", non certamente un progetto minore bensì quello che racchiude la visione spirituale e valoriale della casa editrice nonché l'obiettivo fondativo di trasmetterla ai giovani lettori. La collana si avvia sulla scia della reintroduzione dell'insegnamento religioso a scuola con la riforma Gentile di due anni prima, come ci permette di capire il catalogo di qualche anno dopo in cui viene esplicitato «una più saggia e onesta comprensione dei bisogni spirituali delle nuove generazioni, fece introdurre finalmente nella scuola l'insegnamento religioso e, con esso, la necessità di conoscere la vita e le opere di quegli uomini illuminati da Dio, apostoli di carità»⁴¹. Questa collana, che intendeva trattare «letture storiche di religione cattolica, avendo riguardo alla tradizione agiografica locale e nazionale»⁴², risponde a un progetto che da qualche anno la SEI pare avesse a cuore di realizzare: già nel 1921 infatti l'editrice aveva provato ad avviare la collana con il medesimo titolo (o almeno così ci fa pensare la copertina dell'opera di Luigi

³⁹ Archivio Provenzal, Voghera, Lettera datata 16 settembre 1949, Cartella n. 5, Fascicolo n. 104.

⁴⁰ Cfr. Targhetta, *Serenant et Illuminant*, cit., p. 73 e G. Chiosso, *Il rinnovamento del libro scolastico nelle esperienze di Giuseppe Lombardo Radice e dei "lombardiani"*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 127-139.

⁴¹ Catalogo SEI, 1928, p. 21.

⁴² R.D. 1° ottobre 1923, n. 2185.

Tonelli dedicata al Beato Giovanni Colombini) ma senza dar alcun seguito all'iniziativa. Quando nel 1925 l'editore decide di dare sistematicità al progetto e di affidarlo a Fanciulli, esso incarna in sé non solo i riferimenti valoriali della SEI ma anche un insieme di rapporti e di equilibri più ampi e articolati. Infatti nel medesimo anno in cui si avvia "Le vite dei santi narrate ai giovani", parallelamente vengono editati dalla SEI una serie di volumi raccolti nella collana "Le vite dei santi narrate ai fanciulli". La differenza tra i due progetti non è riassumibile semplicemente nella fascia di età del lettore di riferimento quanto piuttosto nei rapporti tra l'editore torinese e l'UFICI (Unione Femminile Cattolica Italiana) di cui la SEI tiene a rieditare alcuni volumi curati dai suoi rappresentanti e usciti alcuni anni prima con i caratteri della Libreria Editrice Ferrari di Roma⁴³. Tali volumi vengono riediti a marchio SEI ma mantenendo tutti i riferimenti presenti nella precedente edizione relativi alla cura dei volumi da parte appunto dell'UFICI e, specificamente, della sua Presidente Maddalena Patrizi. In qualche modo questa seconda collana, parallela a quella curata da Fanciulli ma non assegnata a lui come direzione, può voler sottolineare il rapporto diretto tra la SEI e il papato visto che per statuto è il papa stesso a nominare Presidente e assistente centrale di questa associazione fondata per volere di Benedetto XV nel 1919. Elemento particolare è che entrambe queste collane "parallele", che nei loro contenuti intendono rappresentare l'essenza stessa della casa editrice (ricordiamo che don Bosco nel fondare la tipografia editrice intendeva appunto diffondere buona stampa educativa per arrivare ai giovani) hanno una battuta di arresto già l'anno successivo alla loro creazione.

Può essere significativo provare a comprenderne la causa attraverso l'analisi di alcuni dati di contesto per approfondire la situazione in cui la collana diretta da Fanciulli si era trovata ad operare. In primis è necessario non trascurare il clima interno alla SEI in cui l'allora direttore generale Giuseppe Caccia era orientato a privilegiare i ritorni commerciali anche a costo di dare dell'editrice «un'immagine assai laica»⁴⁴, tanto da arrivare per queste sue posizioni a scontri che possiamo definire aperti con diversi esponenti salesiani. Non stupirebbe se, a fronte di vendite non eccellenti, Caccia avesse deciso di congelare le pubblicazioni di queste collane così apertamente devozionali. Non pare casuale però che le collane interrompano le uscite proprio a ridosso dell'avvio del forte scontro tra Partito fascista e Chiesa in merito alle associazioni cattoliche giovanili e all'educazione dei giovani. È Mussolini stesso a ricordare nel suo noto discorso alla Camera dei deputati del 13 maggio 1929 sui Patti Lateranensi come per tutto il 1927, le trattative per la Conciliazione erano rimaste sospese proprio

⁴³ La libreria editrice apre a Roma nel 1905 e la sua produzione è connotata da un «marcato interesse religioso che spaziò da tematiche storiche e filologiche ad altre di natura più apologetica e spirituale» di cui la SEI aveva acquisito la rappresentanza esclusiva già nel 1921. Cfr. G. Chiosso (ed.), *TESEO '900. Editori scolastico-educativi del primo Novecento*, Milano, Bibliografica, 2008, p. 194.

⁴⁴ Targhetta, *Serenant et illuminant*, cit., p. 59.

per la questione dei boy-scouts cattolici. La SEI avrebbe quindi “congelato” queste collane in attesa di vedere quale direzione avrebbero intrapreso i rapporti tra il mondo cattolico di cui era rappresentante e il potere politico che mirava sempre più ad arrogarsi un ruolo da protagonista nell’educazione dei giovani. Proprio nel 1926 infatti era stata fondata l’Opera Nazionale Balilla, organizzazione giovanile volta ad occuparsi dell’educazione fisica e morale delle nuove generazioni, improntata verso un modello di “italiano nuovo”, disciplinato e virile, comunque lontano dai ritratti edulcorati e spesso fantasiosi contenuti all’interno dei volumi “Le vite dei santi narrate ai giovani”. Non è quindi del tutto da escludere una posizione attendista da parte della SEI nel continuare la produzione delle sue due collane più apertamente volte a connotarne l’educazione morale dei giovani: era necessario per l’editrice infatti mantenere un equilibrio di buoni rapporti con il partito al potere, garantiti anche dai legami di amicizia con rappresentanti ministeriali quali Nazareno Padellaro e Cesare Maria De Vecchi⁴⁵, senza urtare nello stesso tempo le autorità religiose. Corrobora l’ipotesi di una cauta pausa nelle pubblicazioni piuttosto che di una chiusura definitiva dei progetti anche il fatto che la collana diretta da Fanciulli in realtà nel 1931 riprende vita e, senza apparente soluzione di continuità, in quel solo anno propone otto nuovi romanzi dedicati alla vita dei santi. Anche questa data porta con sé una necessaria riflessione: il 1931 è proprio l’anno in cui scoppia un vero e proprio conflitto tra Mussolini e il papato in merito alle interpretazioni dei Patti Lateranensi e specificamente sui compiti dell’Azione Cattolica e sull’educazione dei giovani. Il pensiero di Mussolini si era trasformato già in azione aperta contro la stampa cattolica (come riporta lui stesso nel 1929: «È curioso che in tre mesi, io ho sequestrato più giornali cattolici che nei sette anni precedenti! Era questo, forse, l’unico modo per ricondurli nell’intonazione giusta!»⁴⁶) e alcuni gruppi di azione cattolica erano stati sciolti forzatamente. A fronte dell’acuirsi degli scontri la risposta del Papa Pio XII era stata altrettanto forte e chiara: l’enciclica “Non abbiamo bisogno” del 29 giugno 1931 attacca la visione fascistica della religione e l’intento di monopolizzare la gioventù. Stupisce come in questo contesto in cui il Duce arriva a revocare la compatibilità fra l’iscrizione al Partito Fascista e l’iscrizione alle Associazioni dipendenti dall’Azione Cattolica⁴⁷, Giuseppe Fanciulli che in questi anni aveva consolidato il suo credo religioso ma nel contempo anche la sua «piena e consapevole adesione all’ideologia fascista»⁴⁸, abbia acconsentito a trovarsi in un certo qual modo in mezzo a un gioco di potere così nodale, accettando di riavviare proprio nel 1931 una collana che confermava la visione cattolica della casa editrice torinese ma in qualche modo sfidava la volontà del

⁴⁵ Id., *Sviluppo e ridimensionamento di un’egemonia industriale: l’editoria scolastica torinese tra le due guerre*, «Scrinia», vol. IV, n. 3, 2007, pp. 97-114.

⁴⁶ Discorso di Mussolini alla Camera dei deputati del 13 maggio 1929.

⁴⁷ Circolare del Segretario del Partito emanata il 9 luglio 1931 dall’Ufficio stampa del P.N.F.

⁴⁸ Montino, *Le tre Italie*, cit., p. 97.

partito fascista di occuparsi direttamente dell'educazione giovanile sottraendo alla sfera della Chiesa e delle famiglie questo compito. Di certo non sono da trascurare le caratteristiche specifiche del rapporto tra salesiani e fascismo connotato dai «tentativi che il regime fece per la massima saldatura possibile dei salesiani al fascismo»⁴⁹ che avevano raggiunto un apice nella beatificazione del fondatore salesiano don Bosco nel 1929 e nella sua esaltazione come «il più italiano dei Santi»⁵⁰. Questo rapporto intessuto sapientemente dal primo ambasciatore italiano presso la Santa Sede, Cesare Maria De Vecchi, in ottimi rapporti con i salesiani, fa in modo che «per la storia salesiana, gli anni tra 1929 ed il 1934 rivestono un ruolo di fondamentale importanza [...]. Nel momento stesso in cui si celebrava l'apogeo del fondatore, l'accordo ed il consenso della famiglia salesiana nei confronti del regime finì per trovare un'ulteriore convalida nella concessione di particolari benefici da parte del fascismo redentore di terre e costruttore di città»⁵¹.

Tra le maglie della storia di Italia e della storia salesiana si gioca quindi la partita di questo progetto editoriale affidato a Fanciulli, che in tutta evidenza non appare una collana qualsiasi bensì acquisisce significati simbolici in un momento storico assai particolare dove spesso i meta-messaggi valevano almeno quanto quelli dichiarati apertamente.

Per l'avvio della collana, Fanciulli decide di rivolgersi in gran parte (ad eccezione di Milly Dandolo) a scrittori estranei fino a quel momento alla SEI e lontani dal mondo della letteratura per l'infanzia. È il caso per esempio di Valentino Piccoli, classe 1892, noto per i suoi libri di commenti su opere della letteratura italiana, che si cimenta per la prima volta con il genere del romanzo; dell'emiliano Natale Grimaldi che non aveva avuto né avrà altri rapporti con la SEI, così come di Peppina Dore, suora benedettina, romanziera, soggettista e sceneggiatrice per il cinema e di suo fratello Giampietro Dore, scrittore religioso, giornalista, direttore editoriale e presidente della casa editrice Studium e consigliere del Consiglio d'amministrazione della RAI.

Quando il Bollettino Salesiano del 1931 annuncia gli otto nuovi volumi della seconda serie, il direttore Fanciulli non sembra modificare l'impostazione data alla sua collana e nuovamente, accanto alle colleghe SEI Francesca Castellino e Camilla del Soldato, sembra prediligere nomi di giornalisti, letterati, scrittori che non hanno mai avuto rapporti con l'editore torinese e che non avevano scelto di dedicarsi alla produzione per l'infanzia, come nel caso di Ettore Allodoli, Hilda

⁴⁹ P. Stella, *Don Bosco nella storia della religiosità cattolica. La canonizzazione (1888-1934)*, Roma, LAS, 1988, p. 254.

⁵⁰ C.M. De Vecchi di Val Cismon, *Don Bosco Santo italiano. Commemorazione tenuta in Campidoglio il 2 aprile 1934-XII alla presenza di S. E. Benito Mussolini, Capo del Governo e Duce del Fascismo, di Eminentissimi Cardinali e delle massime Gerarchie della Chiesa e dello Stato*, «Torino», n. 4, aprile 1934-XII.

⁵¹ C. Ciammaruconi, *I Salesiani a Littoria tra accordo e consenso al regime fascista. Contributi da una ricerca in corso*, «Ricerche Storiche Salesiane», vol. 23, n. 45, 2004, pp. 471-486.

Montesi Festa, Lucia Tranquilli Boccassini, Arturo Stanghellini, Lorenzo Gigli e Mercedes Mundula.

Una terza serie della collana viene annunciata per l'anno 1933 e, anche se non avrà pieno sviluppo, viene ribadita la sua importanza strategica in seno a un editore cattolico dichiarando che «Con Le vite dei Santi narrate ai giovani la SEI intende costruire un'agile storia del cristianesimo»⁵².

Arrivati a questa data però il ruolo di Fanciulli in SEI si era modificato e consolidato: contemporaneamente alla collana di cui si è parlato, a partire dal 1927 gli era stata affidata la direzione anche di un nuovo progetto, «I Migliori Scrittori stranieri per l'infanzia e per la gioventù» rivolto ai ragazzi da 8 a 15 anni con lo scopo di far conoscere al pubblico italiano «ciò che di meglio si è fatto per la letteratura per infanzia e gioventù dagli scrittori stranieri»⁵³. Le prime uscite rappresentano una certezza rispetto ai gusti del pubblico, riproponendo grandi classici quali testi di Andersen e Grimm, tradotti e rivisti da Marialù Fanciulli, moglie di Giuseppe Fanciulli. È un inizio che sonda il terreno, per poi allargare il campo a «opere classiche e famose, come altre recenti o poco note sono presentate in eleganti volumi di circa 200 pagine»⁵⁴. In effetti le scelte di Fanciulli ricadono poi su opere più particolari quali *Fer Ferka e Wania* del russo Eugenio Elatic, *Il piccolo Much e altre novelle* del tedesco Wilhelm Hauff; *I raccolti straordinari* del francese Ernest Hello e due opere di Julius Lercke, *Gli abitanti di Villa-verde* e *Racconti di tutti i paesi*. Con queste scelte Fanciulli, che già aveva intrapreso anche la strada di critico di letteratura per l'infanzia pubblicando come già detto nel 1926 proprio con la SEI il volume *La letteratura per l'infanzia*, conferma la sua conoscenza della produzione per l'infanzia internazionale e ci rende partecipi della sua visione a riguardo⁵⁵. In particolare Fanciulli sottolinea come a suo avviso l'importanza della traduzione e del riadattamento siano quasi pari alla qualità del testo stesso: entrambi debbono seguire il criterio di «bontà»: «bontà del testo e della traduzione e decoro dell'edizione fanno sì che questa collezione sia adatta a tutti i ragazzi e a tutti i giovani che desiderano passare nelle letture ore di vero diletto e arricchire le loro biblioteche di opere utili, belle e pregevoli»⁵⁶. Questa collana di traduzioni di autori stranieri prosegue fino al 1936, arrivando assai in là nel tempo se considerata in relazione al fatto che già nel 1928 Fanciulli aveva realizzato una biografia di Mussolini e l'anno successivo una vera e propria glorificazione dell'italianità e dei suoi eroi che mal si conciliano con l'apprezzamento verso ciò che è straniero⁵⁷. Solo due anni dopo la conclusione

⁵² Catalogo SEI, 1933, p. 19.

⁵³ Catalogo SEI, 1928, p. 29.

⁵⁴ *Ibid.*

⁵⁵ Sulla conoscenza da parte di Fanciulli delle letterature straniere cfr. Montino, *Le tre Italie*, cit., pp. 135-137.

⁵⁶ Catalogo SEI, 1928, p. 12.

⁵⁷ Si tratta rispettivamente dei volumi *Il duce del popolo italiano*, Segreteria generali fasci

de “I migliori scrittori stranieri per l’infanzia e la gioventù” Fanciulli prenderà parte convintamente al Convegno di Bologna da cui scaturisce il *Manifesto della letteratura giovanile* che tra i suoi punti annovera il rifiuto dei libri stranieri in quanto nocivi alla formazione della coscienza nazionale⁵⁸.

Più in linea con il clima del periodo appare la terza collana che la SEI affida a Fanciulli agli inizi degli anni Trenta, che rappresenta l’unico nuovo progetto per ragazzi avviato dalla SEI nell’intero decennio, “I capolavori della letteratura esposti ai ragazzi e al popolo”. Al confine tra lettura amena e libro per la scuola, la collana propone in particolare fatti che si pongono tra storia e leggenda, tra poema epico e classici della letteratura, ampiamente rimaneggiati e resi «a misura di bambino e giovane» e cioè «nitidi di forma e chiari e interessanti di contenuto»⁵⁹. Il progetto si prefigge di essere un aiuto ai docenti nell’insegnamento della storia ma vuole essere nel contempo anche uno «stimolatore di fantasia». Ma leggendone la presentazione ufficiale riecheggia la volontà di fornire ai giovani modelli che sanno di eroi: «Ritornano gli eroi della leggenda e della storia, richiamati dall’amore che ormai i nostri giovani sentono rinascere per tutto quanto abbia volto di bellezza, voce di poesia, incanto di epopea»⁶⁰.

L’impianto grafico ed editoriale è del tutto simile alle altre collane dirette da Fanciulli: carattere rigoroso, fregi classici, inizio e fine dei capitoli segnati da riproduzioni di incisioni. La collana si avvia con *Il ritorno di Ulisse* di Marino Szombathely, letterato e poeta, traduttore, noto per la sua versione dell’*Odissea*⁶¹. Il suo legame con l’editore torinese nasce proprio in occasione della realizzazione di questa collana e si svilupperà nel secondo dopoguerra. Nel 1931 tre nuovi volumi arricchiscono il progetto: accanto a *Il romanzo di Enea* di Fanciulli stesso, troviamo una rivisitazione dell’*Iliade* curata da Alba Cinzia, nome con cui si firma Alba Cinzia Scalcini in Caldi (1870-1960)⁶². Originaria di Sondrio ma vissuta a lungo a Torino per seguire il marito professore di filosofia, Alba Cinzia si dedica a poesia e prosa, con grande attenzione verso i classici

all’estero, s.l., 1928 e *Glorie di Italia*, Torino, SEI, 1929.

⁵⁸ Sulle intromissioni del fascismo nel mondo dell’editoria scolastico-educativa cfr.: M. Galfre, *Il regime degli editori: libri, scuola e fascismo*, Roma-Bari, Laterza, 2005; A. Ascenzi, R. Sani (edd.), *Il libro per la scuola nel ventennio fascista. La normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizioni, 2009; R. Sani, *Editoria scolastica e libri di testo nel ventennio fascista: dalla riforma Gentile alla Carta della Scuola di Bottai*, in V. Bosna, A. Cagnolati (edd.), *Itinerari nella storiografia educativa*, Bari, Cacucci editore, 2019, pp. 41-62; C. Ghizzoni, *L’infanzia nell’Italia fascista*, in M. Gecchele, S. Polenghi, P. Dal Toso (edd.), *Il Novecento: il secolo del bambino?*, Parma, Edizioni Junior, 2017, pp. 93-112; A. Ascenzi, *Il fascismo e la mobilitazione della gioventù italiana all’estero. Ideologia e propaganda nei periodici per ragazzi*, Milano, FrancoAngeli, 2020.

⁵⁹ Catalogo SEI, 1933, p. 26.

⁶⁰ Bollettino Salesiano, settembre 1931.

⁶¹ C. Desinan, *Marino Szombathely*, in Chiosso, Sani (edd.), *Dizionario Biografico dell’Educazione*, cit., Vol. II.

⁶² «Giornale della Libreria», vol. 43, n. 1, 1931, p. 77.

e verso l'attività di traduttrice⁶³. Completa la triade un'opera del citato Dino Provenzal, scrittore versatile che ama tradurre testi stranieri e trattare nelle sue opere il mondo della scuola e i fatti reali⁶⁴. *Il Dante dei piccoli* è una riedizione della sua *Divina Commedia spiegata ai bambini*, uscita per l'editore La Voce nel 1922⁶⁵. Di origine ebraica, Provenzal nel 1926 si converte al cattolicesimo ma le leggi razziali lo colpiscono ugualmente escludendolo dall'insegnamento e dall'attività di scrittore, motivo che potrebbe essere la causa dell'esclusione del suo volume nella presentazione di questa collana diretta da Fanciulli all'interno del catalogo SEI del 1942 dove *Il Dante dei piccoli* viene sostituito da un altro libro di Alba Cinzia che in realtà era già uscito fuori collana nel 1935. Degli altri sette volumi annunciati nel catalogo del 1942 come "in preparazione" in realtà non si troverà traccia in futuro e senza ulteriori sviluppi anche questa collana coordinata da Fanciulli non avrà sviluppi al termine del conflitto bellico.

Con l'aggiunta di quest'ultimo progetto Fanciulli, dunque, si trova nei primi anni Trenta a dirigere in contemporanea tre collane per ragazzi all'interno della SEI: una di biografie romanzate dei santi che, iniziata nel 1925, prosegue pur con una forte interruzione fino al 1933; una dedicata ai migliori scrittori stranieri per l'infanzia (1927-1936) e infine una terza con i grandi capolavori della letteratura italiana in versione riadattata. A ben vedere, in realtà, nessuna delle tre collane pare riscuotere un gran successo pur affrontando temi che nella teoria avrebbero dovuto attirare l'attenzione del pubblico a cui si rivolgeva, considerando specificamente i canali salesiani e quelli scolastici cui si rivolgeva la SEI. Il ruolo che a Fanciulli sembra riuscire meglio all'interno dell'editore torinese è quello di "creatore di legami" con autori nuovi che porta ad avvicinarsi alla casa editrice, unitamente di certo al ruolo di autore di libri di grande successo. La sua produttività con la SEI negli anni Trenta sembra instancabile, il ritmo delle pubblicazioni è incalzante: nel solo 1931, a titolo di esempio, vedono la luce il citato *Il romanzo di Enea*, *Il venerabile Contardo Ferrini* e una antologia per le scuole di avviamento professionale, *Giorni operosi*.

In questo decennio all'aumentare della sua produzione personale sembra diminuire proporzionalmente il suo impegno di organizzatore culturale all'interno della casa editrice, come se le sue energie fossero totalmente assorbite dal ruolo di sostegno e propaganda dell'ideologia fascista attraverso la redazione di contenuti ad hoc.

Sono questi infatti gli anni in cui Fanciulli garantisce in qualche modo alla SEI una sorta di benessere o lasciapassare rispetto ai sempre più pressanti

⁶³ R. Farina, *Dizionario Biografico delle donne lombarde*, Milano, Baldini & Castaldi, 1985, p. 161.

⁶⁴ L. Cantatore, *Provenzal Dino*, in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione*, cit., Vol. II; G. Calandra, *Dino Provenzal*, «La parola e i percorsi della memoria», n. 3, 1985.

⁶⁵ La storia letteraria di riduzioni e trascrizioni di Dante a favore dei giovani lettori è ripercorsa nel saggio: S. Fava, *Dante per i bambini: percorsi tra riduzioni e riscritture nella prima metà del Novecento*, «Ricerche di Pedagogia e Didattica», vol. 12, n. 1, 2014, pp. 113-121.

condizionamenti della politica verso i contenuti prodotti dagli editori: il suo *Lisa-Betta*, edito con la SEI nel 1932 riceve la medaglia d'oro del Ministero dell'Educazione Nazionale, come annuncia a piena pagina il Bollettino Salesiano:

Giuseppe Fanciulli col suo nuovo romanzo LISA-BETTA al Premio letterario di Viareggio (1932), il più importante e ambito fra quanti sono disputati in Italia, ha guadagnato la grande medaglia d'oro del Ministero dell'Educazione Nazionale. È la prima volta che un libro destinato ai ragazzi si fa largo fra tante altre opere di autori celebri, destinata al gran pubblico degli adulti⁶⁶.

Il commento di Lorenzo Gigli apparso sulla «Gazzetta del Popolo», quando al volume *Lisa-Betta* fu aggiudicato il Premio Viareggio, amplifica l'eco del premio:

Giuseppe Fanciulli continua a scrivere libri, per i piccini e per i grandi, in quella sua saporita e nutrita prosa toscana senza riboboli, che scorre via trascinandosi lieve e serena, pensieri di bontà, insegnamenti di sano e fattivo ottimismo ispirato al tradizionale buon senso della nostra stirpe millenaria. Perciò egli è uno scrittore italianissimo, nel significato completo, un educatore che bada alla teoria pedagogica fino a un certo punto, ma che bada soprattutto alla sostanza della sua missione, alla feconda virtù dell'esempio e del sentimento, e che li traduce ogni giorno in pratica, distillando dalla vita quel succo di vero, di bello e di bene che essa reca nelle sue midolle segrete e che è pronta ad offrire a chi sappia divinarlo e scoprirlo. Quasi tutti i libri di Giuseppe Fanciulli sono nati da un intimo bisogno di parlare con gli altri, di discorrere familiarmente coi piccoli senza tener cattedra, ben sì convocandoli con la luce di un sorriso e col richiamo della fantasia⁶⁷.

Questi riconoscimenti pubblici e la presenza di commenti diffusi su svariate riviste rappresentano per la SEI non solo una sorta di campagna pubblicitaria gratuita ma proprio un aperto e insistito «riconoscimento di bontà» dei suoi prodotti rispetto ai desiderata del potere in carica, una sorta di certificazione.

Un altro premio per un volume edito con la SEI giunge nel 1937 a Fanciulli, che si aggiudica con *Il giardino delle meraviglie* il premio Sabaudia con questa motivazione da parte della Commissione Giudicatrice: «L'opera di Fanciulli, pervasa da un commosso senso lirico della terra, scritta in forma nitida, agile e soprattutto schiettamente italiana si distacca in modo netto dalle altre premiate al concorso e conferma le belle qualità di artista che il Fanciulli ha sempre manifestato nella sua nobile e intensa attività di scrittore»⁶⁸. Questo successo giustifica l'enfasi con cui la casa editrice presenta al pubblico il nuovo volume: «la critica lo ha salutato con la lode che si attribuisce ai capolavori»⁶⁹.

⁶⁶ Bollettino Salesiano, agosto 1932.

⁶⁷ D. Mondrone, *Un asso della letteratura infantile: Giuseppe Fanciulli*, «La civiltà cattolica», vol. 102, n. 2, 1951, p. 485.

⁶⁸ Catalogo SEI, 1938, p. 15.

⁶⁹ *Ibid.*

Senza voler citare tutti gli innumerevoli testi realizzati per la SEI da Fanciulli in questo decennio, certamente è nel 1938 che la sua produzione tocca l'apice della sua promozione mussoliniana presso i giovani con *Cuore del Novecento*, presentato dall'editore come

il libro che tutti i ragazzi italiani devono leggere. In esso Giuseppe Fanciulli ha profuso i tesori della sua esperienza e del suo ingegno. La vicenda serrata presenta una numerosa schiera di ragazzi diversissimi e pure concorsi, sullo sfondo luminoso dell'Italia di Mussolini: e dalla vita vera, attuale, rappresentata così efficacemente, sbocciano come poetici fiori, sei stupende novelle. Ogni ragazzo italiano ritroverà un po' di se stesso in quei compagni nuovi, ognuno si commuoverà per quella cara poesia⁷⁰.

Con l'avanzare della guerra, nel 1942, l'editrice esplicita ancora maggiormente il ruolo di manifesto fascista rappresentato da questo romanzo per ragazzi «Se fu bello il *Cuore* deamicisiano questo è il *Cuore* dei ragazzi di Mussolini»⁷¹. Accanto a questo assai esplicito richiamo nazionalistico, la SEI utilizza come «Testimonianza d'Impero» volumi precedenti di Fanciulli, e cioè la celebrazione delle glorie artistiche e letterarie presenti in *Anima italiana* (1934) e le bellezze delle regioni, la superiorità nella poesia, nella scienza e nella storia presenti in *Glorie d'Italia* (1929).

L'eccessivo nazionalismo e la troppo marcata sottolineatura di idee preconfezionate, espressione del potere dell'epoca, fanno cadere Fanciulli nella retorica e nell'eccesso ma pare di poter dire che in taluni casi, più che la reale qualità letteraria, furono proprio queste sue caratteristiche a garantirgli il successo all'epoca, in particolare nei romanzi, visto che «tutti i critici che si sono occupati di Fanciulli, sottolineano come egli fu brillante nel bozzetto e nel racconto breve, ma quanto meno poco efficace se non insufficiente nel romanzo»⁷².

Facendo un'analisi a posteriori del rapporto SEI-Fanciulli, a pochi anni di distanza dalla seconda guerra mondiale i critici mettevano in luce principalmente il legame dato da una medesima visione religiosa:

d'una religiosità cristiana che lievita anche là dove espressamente non parla né di religione, né di misteri cristiani, né di figure e fatti di vita cattolica. Si spiega come una delle case editrici più impegnate nella missione educativa della gioventù abbia trovato in Giuseppe Fanciulli il collaboratore che rispondeva come pochi allo spirito di San Giovanni Bosco e ne abbia in gran parte monopolizzato l'opera per spargerla tra i giovani (SEI)⁷³.

A distanza di tempo noi oggi rileviamo come gli anni del ventennio fascista siano quelli della piena maturità artistica e intellettuale di Fanciulli⁷⁴ e come

⁷⁰ *Ibid.*, p. 21.

⁷¹ Catalogo SEI, 1942, p. 125.

⁷² Montino, *Le tre Italie*, cit., p. 18.

⁷³ D. Mondrone, *Un asso della letteratura infantile: Giuseppe Fanciulli*, «La civiltà cattolica», vol. 102, n. 2, 1951.

⁷⁴ Montino, *Le tre Italie*, cit., p. 97.

questi anni coincidano con un'ampia e articolata collaborazione con la SEI. Fanciulli non interrompe i rapporti con altri editori ma certamente esprime più solidamente questa sua maturità professionale con l'editrice torinese. Peraltro coincidono con la piena adesione dell'autore al fascismo e di aperta vicinanza al potere del momento.

L'impressione generale che si ricava sul rapporto tra Fanciulli e la SEI, dunque, in particolare se esaminato alla luce dell'analisi dell'intero panorama della produzione per l'infanzia dell'editrice nel ventennio fascista, è che in qualche modo Fanciulli sia stato ben utilizzato dall'editore torinese come sorta di lasciapassare, come autore filogovernativo da mettere in vetrina per poi aver la libertà di continuare a pubblicare "tra le righe" autori certamente meno graditi al potere quali Arpalice Cuman Pertile, Corrado Tumiatì, Filiberto Farci, Francesco Perri⁷⁵.

Conclusioni

Abbiamo trattato due figure assai diverse tra loro: Fanciulli ben più noto, collaboratore in contemporanea di svariate case editrici, sostenitore riconosciuto del partito fascista ed esaltatore dei suoi valori; Castellino che lavora quasi esclusivamente per la SEI, che pur rivolgendosi a entrambi i sessi, sembra prediligere la scrittura per ragazze, con temi sempre legati alla buona educazione e alla moralità. La SEI stessa nei suoi cataloghi, pur lasciando spazio alla Castellino e lodandone il valore, non le darà mai il medesimo rilievo offerto a Fanciulli attraverso per esempio la presenza a tutta pagina in diverse sezioni dei cataloghi. Però entrambi hanno avuto un ruolo decisamente centrale, come dimostrato oltretutto dal fatto che siano gli unici due direttori di collana esplicitati all'interno di tutta la produzione per ragazzi di questi anni. Entrambi, con le loro caratteristiche e con la loro rete di rapporti, sono strettamente funzionali alle esigenze della casa editrice salesiana in quel specifico momento storico e in quel specifico momento di volontà di espansione della produzione per l'infanzia: è come se i loro ruoli si compenetrassero, completandosi l'un l'altro rispetto alle esigenze complessive dell'editrice. In sintesi è come se, unendo le forze, pur derivanti da due profili così differenti, Castellino e Fanciulli abbiano saputo raccogliere attorno a sé quel gruppo di scrittori e illustratori che fa la fortuna della produzione per l'infanzia SEI nel periodo tra le due guerre e abbiano incarnato l'immagine e la politica culturale-educativa che la SEI voleva (e *doveva*, in un certo momento storico) dare di sé.

⁷⁵ Cfr. Catalogo SEI, 1942.

Critical reviews



Rassegne critiche,
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Proposte di letture storico educative

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Proposals for historical and educational readings

ABSTRACT: The article proposes an interesting bibliographic review of the most recent works of History of pedagogy and History of education published in recent years in Italy. The author, analyzing the individual works, presents the topics covered in each volume and puts the focus on some fundamental aspects of the Italian historical-educational culture.

EET/TEE KEYWORDS: Historiography; Historical research; History of education; Historical method; Italy; XXth-XXIst Centuries.

Propongo anche per il biennio 2019-2020 – in continuazione con le analoghe iniziative predisposte in passato e senza alcuna pretesa di fornire una rassegna esaustiva – qualche segnalazione di studi e ricerche meritevoli di attenzione, semplici schede di lettura.

La storia della didattica

Mentre sulla scena della ricerca storico educativa e pedagogica tendono a prevalere lavori di corto respiro limitati a piccoli scorci storici – a cui spesso i più giovani ricorrono per soddisfare i vincoli posti dalle mediane –, va sottolineato il meritorio impegno di Monica Ferrari e di Matteo Morandi di proporre in tre volumi, attraverso saggi di studiosi assai qualificati, l'evoluzione delle pratiche educative e didattiche dall'età moderna alla scuola di oggi. Già ho segnalato l'uscita del primo volume (ved. Hecl, 2020/1, pp. 627-628) cui hanno fatto seguito nei mesi scorsi gli altri due libri che completano l'impresa, rispettivamente *Maestri e pratiche educative dalla Riforma alla Rivoluzione francese* e *Maestri e pratiche educative dall'Ottocento ad oggi*¹.

¹ M. Ferrari, M. Morandi (edd.), *Maestri e pratiche educative dalla Riforma alla Rivoluzione*

Il volume dedicato all'età moderna propone alcuni significativi sondaggi di cui sono autori i migliori specialisti di storia educativa e scolastica tra Sei e Settecento, volti a indagare una duplice questione: lo scenario dei protagonisti che solcano le scene pedagogiche e la varietà dei tentativi messi in campo alla ricerca del metodo. Scorrono così – disposti idealmente intorno alla figura che troneggia al centro della scena educativa, il precettore per i figli delle élites, cui è dedicato il saggio di Monica Ferrari – gli altri contributi: le strategie educative e pedagogiche predisposte nel mondo protestante (Simona Negruzzo), le esperienze di teatro didattico dei gesuiti in Germania (Luana Salvarani), i maestri e le maestre di dottrina cristiana in Italia (Miriam Turrini), le pratiche del leggere e dello scrivere nella Spagna in età moderna (Antonio Castillo Gómez), il costituirsi e il primo diffondersi del metodo normale (Maurizio Piseri) e infine la scuola della rivoluzione francese (Serge Tomamichel).

Per quanto riguarda l'Otto-Novecento il volume si apre con due contributi di carattere generale sulle trasformazioni che percorrono la concezione dell'infanzia, la lotta contro l'ignoranza, l'accesso all'istruzione anche dei ceti subalterni e via via – attraverso quella che Monica Galfré definisce la modernizzazione autoritaria del fascismo degli anni '30 e poi la scuola della Repubblica – fino alla conquista (non ancora pienamente ed equamente raggiunta) della scuola di massa nella seconda metà del XX secolo.

Gli altri saggi propongono tematiche specifiche come la ricognizione sulla scuola dell'infanzia ottocentesca proposta da Monica Ferrari, una inedita storia del voto scolastico (Matteo Morandi), due contributi sulla stagione dell'idealismo italiano (Hervé Cavallera e Lorenzo Cantatore), l'esperienza delle scuole all'aperto (Mirella D'Ascenzo), la lotta contro l'analfabetismo riletta attraverso la figura del maestro Alberto Manzi (Roberto Farné). Fanno seguito altri scritti di impronta meno pedagogica ma interessanti e utili a illustrare alcuni aspetti della società italiana del dopoguerra (le scuole del Partito comunista di Andrea Pozzetta, le pratiche di autoformazione nella *pop culture* di Federico Piseri e una riflessione su istruzione e capitale umano di Omar Mazzotti).

Questa stringata sintesi dei due volumi non rende la varietà e la ricchezza dell'impresa condotta da Monica Ferrari e Matteo Morandi non solo apprezzabile sul piano scientifico, ma opportuna anche in funzione didattica come efficace strumento per introdurre gli studenti alla conoscenza della storia educativa nel suo graduale stratificarsi.

In chiusura mi permetto una piccola osservazione: la parte relativa al secondo Novecento avrebbe meritato almeno uno sguardo alla egemonia conquistata, da Bruner in avanti, dalle teorie e prassi del mondo anglosassone e il conseguente appannamento di una tradizione scolastica e pedagogica

centrata sulla spontaneità e creatività dell'allievo e sulla qualità della relazione interpersonale.

L'alfabeto nelle campagne

Nell'inserirsi in un ambito di ricerche – inaugurato anni fa da Marino Raicich con un pionieristico saggio sulla maestra di campagna – che in questi ultimi anni ha consentito una più precisa conoscenza della realtà scolastica rurale, Michela D'Alessio ha ricostruito l'azione educativa svolta dall'Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia (Animi) in Basilicata tra il 1921 e il 1928, anno in cui per insanabili contrasti con il fascismo il sodalizio filantropico rinunciò alla delega². Le piccole scuole rurali dislocate nelle aree più remote della regione passarono quindi all'Ente Pugliese di Cultura, poi nel 1934 furono assorbite all'interno dell'attività svolta dall'Opera Nazionale Balilla e infine nel 1939 acquisite dal Ministero dell'Educazione Nazionale.

Il saggio – condotto su fonti di prima mano e arricchito da un'ampia appendice documentaria – si affianca ed integra quanto già è stato indagato sull'opera dell'Animi (Tomasi, Fusco, Alatri, Serpe, Mattei) e, oltre a documentare una pagina significativa della storia scolastica lucana, fornisce ulteriori elementi, d'un lato, per una più approfondita conoscenza delle iniziative a favore della scolarizzazione infantile e contro l'analfabetismo degli adulti nel Mezzogiorno italiano e, dall'altro, per cogliere tempi e modalità della transizione verso l'inquadramento nel fascismo.

Pur riconoscendo il valore sociale ed educativa dell'opera compiuta dall'Animi e, sul piano pedagogico, il fondamentale apporto di Lombardo Radice e della moglie Gemma (l'esperienza delle cosiddette “scuolette” costituì un laboratorio nel quale furono messe a punto soluzioni pratiche poi migrate nei Programmi per la scuola elementare fortemente innovativi del 1923), D'Alessio non sfugge anche a una lettura serenamente critica dell'esperienza. Questa mi pare la sezione più significativa della ricerca.

Nella parte conclusiva del lavoro, l'autrice considera, infatti, anche i fattori che, al di là della generosità dei promotori, implicarono la disgregazione del progetto iniziale dell'Animi come, ad esempio, la complessa armonizzazione dell'iniziativa privata con i vincoli posti dal finanziamento pubblico; il passaggio da un'iniziale azione di supplenza di durata temporanea a un piano esteso e ramificato in varie direzioni; la stridente contraddizione e l'infausta “concorrenza” tra l'impegno volontario e parallelo a quello governativo comunque impegnato ad aprire nuove scuole; il rischio che le piccole scuole

² M. D'Alessio, *L'alfabeto nelle campagne. L'opera educativa dell'ANIMI in Basilicata (1921-1928)*, Venosa, Edizioni Osanna, 2020.

fossero percepite come un'opportunità di occupazione per maestri senza lavoro; il non meno grave rischio che per conciliare la vita dei campi con quella della scuola si creasse di fatto un canale di formazione irregolare con la diserzione dell'obbligo d'istruzione.

Due biografie pedagogiche: Acone e Bertin

Sono usciti presso la casa editrice Studium, quasi in contemporanea, due volumi rispettivamente dedicati a Giuseppe Acone (1942-2018) e a Giovanni Maria Bertin (1912-2002), due figure di primo piano della pedagogia italiana contemporanea, Acone alfiere del umanesimo personalista, Bertin caposcuola del problematicismo pedagogico. I due volumi si presentano con la medesima impostazione: un'introduzione dei curatori (nel caso di Acone, Marinella Attinà e Paola Martino; nel caso di Bertin, Maurizio Fabbri e Tiziana Pironi)³ a un'amplessima proposta antologica dei testi più significativi degli autori e infine una postfazione (per Acone, chi scrive, per Bertin, Massimo Baldacci) il cui obiettivo è quello di individuare i motivi di persistente di attualità che rendono Acone e Bertin tuttora personalità significative sulla scena del dibattito pedagogico.

L'iniziativa di Studium (presso cui qualche tempo fa è uscito un analogo libro dedicato ad Edda Ducci) è meritevole di sicuro apprezzamento per varie ragioni. In primo luogo perché pone a disposizione di studenti e giovani ricercatori dei materiali utili per la conoscenza approfondita di studiosi che hanno scritto pagine importanti nella riflessione pedagogica più recente. Le presentazioni affidate a studiosi che sono stati allievi delle personalità biografate sono particolarmente utili e aggiornate e l'antologia facilita l'accostamento a testi quasi sempre usciti in via definitiva dai circuiti editoriali.

Di fronte alla sudditanza in corso nella circolazione pedagogica nostrana – è questo il secondo motivo di apprezzamento – verso autori stranieri in gran parte anglosassoni (debole ormai la conoscenza della pedagogia francofona e debolissima di quella tedesca) non sembra azione inutile anche valorizzare (ovviamente senza nostalgie od orgogli nazionalistici) autori che per profondità di pensiero e forza argomentativa non sono certamente secondi a nessuno, tanto meno a certe schematiche letture di taglio psicologista e psicoterapeutico che hanno conquistato in anni recenti la centralità della scena educativa.

³ M. Attinà, P. Martino (edd.), *Lo sguardo sul mondo, la ricerca del senso. La proposta educativa di Giuseppe Acone: scelte antologiche*, Roma, Studium, 2020 e M. Fabbri, T. Pironi (edd.), *Educare alla ricerca. Giovanni Maria Bertin precursore del pensiero della complessità*, Roma, Studium, 2020.

Infine un ulteriore pregio dell'iniziativa di Studium sta nel proposito di confrontare il presente con la lezione di un passato non remoto ma assai prossimo, spesso purtroppo dimenticato come se tutto dovesse sempre ricominciare. L'auspicio, dunque, è che l'impresa editoriale avviata con i libri su Ducci, Acone e Bertin prosegua con la proposta di altri autori.

La casa tra pedagogia, storia e letteratura per l'infanzia

La casa nelle varie accezioni in cui può essere interpretata – come luogo fisico di ricovero e protezione, ma anche come luogo protettivo e di sicurezza affettiva – è il tema di un volume collettaneo curato da Giuseppe Zago, Carla Callegari e Marnie Campagnaro, *La casa. Figure, modelli e visioni nella letteratura per l'infanzia dal Novecento ad oggi*⁴. Nel libro s'intrecciano riflessioni e considerazioni che spaziando dalla storia della pedagogia alle trasformazioni che hanno interessato la vita familiare forniscono alla letteratura per l'infanzia molteplici suggestioni per un'ampia e approfondita analisi del tema dell'abitazione così come essa viene considerata e trattata sul piano narrativo.

Il volume si apre con un ampio saggio di Giuseppe Zago che esplora la casa come “oggetto pedagogico”. Vengono ricostruiti i passaggi attraverso cui matura progressivamente nel Novecento, dietro la poderosa spinta della cultura romantica e borghese, un modello educativo ideale centrato sulla interdipendenza tra la dimensione emotivo-affettiva e quella cognitiva rispetto alla quale la casa assume la fisionomia di uno spazio esemplare. In essa è infatti possibile far vivere relazioni gratificanti tra minori e adulti e ad essa si ispirano numerose teorie ed esperienze che hanno cercato di trasferire, con i necessari adattamenti, tale modello – pur con molte varianti sul piano operativo – nelle scuole: in Italia la Casa dei bambini di Maria Montessori e il metodo materno delle sorelle Agazzi, in Germania le Case o focolari di educazione in campagna di Hermann Lietz e le piccole comunità domestiche di Paul Geheeb, negli Stati Uniti il modello scolastico a ispirazione “familiare” di John Dewey.

L'altro asse portante del volume è costituito dal saggio di Marnie Campagnaro del quale vorrei richiamare soprattutto i paragrafi relativi alle “forme dell'abitare” nella letteratura per l'infanzia con due sottolineature. La prima richiama la casa come rifugio nella doppia versione della “casa fortino” e della “casa zattera”: la casa può essere considerata (e venire rappresentata) come uno spazio di protezione rassicurante contro le intemperie o gli imprevisti della vita, ma può anche essere una zattera in balia delle onde, in apparenza fragile

⁴ G. Zago, C. Callegari, M. Campagnaro (edd.), *La casa. Figure, modelli e visioni nella letteratura per l'infanzia dal Novecento ad oggi*, Pensa MultiMedia, Lecce-Rovato, 2019.

e indifesa, ma ugualmente sicura perché luogo di cura, intimità e amorevolezza spesso rappresentato anche con l'immagine del nido. La seconda forma riguarda chi abita la casa e la rappresentazione che ricorre tra l'abitazione e i personaggi che la popolano, con il ricorso agli interni domestici per rafforzare la descrizione dei processi che si stabiliscono tra i protagonisti.

Intorno a questi sguardi generali si svolgono gli altri saggi che sviluppano e approfondiscono tematiche diverse unificate dall'attenzione rivolta soprattutto al genere dell'albo illustrato (Susanna Barsotti, Carla Callegari, Lorenzo Cantatore, Dorena Caroli, Sabrina Fava e Maria Teresa Trisciuzzi).

Scuola democratica e cultura dell'inclusione

Il volume curato da Anna Ascenzi e Roberto Sani – frutto di un convegno svoltosi nell'aprile 2019 nell'Università di Macerata – sullo sviluppo democratico della scuola e la sua apertura inclusiva, *Inclusione e promozione sociale nel sistema formativo italiano dall'Unità ad oggi*⁵, merita una doppia e positiva sottolineatura. La prima riguarda l'opportunità di riprendere e rilanciare un tema fino a qualche anno fa assai dibattuto e poi alquanto uscito dagli schermi della ricerca storico educativa: attraverso quali vie, quali silenzi e quali cause acceleratrici si è compiuto il passaggio dalla scuola dell'élites liberal borghese alla scuola aperta a tutti come indicato dalla Costituzione repubblicana. La seconda ragione è legata alla rassegna riguardante la realtà dell'educazione speciale che documenta come gli studi in tal senso si sono moltiplicati in varie direzioni (sordomuti, ciechi, rachitici, deboli mentali, soggetti disadattati...), ridisegnando e integrando alcuni passaggi della storia scolastica dell'ultimo mezzo secolo.

Scopo del convegno, prima, e del volume, poi, è di illustrare i tempi e le ragioni attraverso cui, è maturata, sulla scia delle visioni democratiche legate al diritto d'istruzione, la “cultura dell'inclusione”, da intendersi non solo nei termini di piena fruibilità della scuola anche alle quote di popolazione scolastica con problemi di vario genere, ma più ampiamente in quanto espressione di un progetto di scuola come fattore di equità e di promozione della persona.

Il libro si articola in tre parti. La prima ripercorre le varie fasi dello sviluppo della scolarizzazione italiana (Roberto Sani) attraverso alcuni passaggi strategici come la battaglia – con i maestri in prima fila – contro l'ignoranza e l'analfabetismo (Carla Ghizzoni), lo sviluppo scolastico del sud con un particolare riguardo all'impegno meridionalistico dell'Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia (Brunella Serpe), i fermenti innovativi

⁵ A. Ascenzi, R. Sani (edd.), *Inclusione e promozione sociale nel sistema formativo italiano dall'Unità ad oggi*, Milano, FrancoAngeli, 2020.

degli anni '60 e '70 con le scuole pilota di don Milani e di Mario Lodi (Juri Meda) e la complessa, e tuttora in corso, transizione dall'università di élite all'università di massa (Luigiaurelio Pomante).

La seconda sezione è dedicata alla presenza femminile nella scuola e al suo fondamentale apporto alla causa dell'istruzione con i contributi di Carmela Covato, Anna Ascenzi, Tiziana Pironi e Francesca Borruso. In questi saggi confluiscono i risultati di indagini e riflessioni che negli ultimi decenni hanno squarciato un territorio a lungo silenzioso e fornito notevoli spunti di ricerca storiografica.

Infine nella terza parte è presentata un'ampia rassegna di studi sulle varie forme di disabilità. Proprio a partire dall'esigenza di rispondere alla realtà dell'alunno disabile matura la «cultura dell'inclusione» che ha fatto compiere (almeno sul piano concettuale perché nella vita quotidiana la realtà è più complicata) un decisivo salto di qualità alla nozione di scuola democratica. Su questi temi si soffermano alcuni saggi di inquadramento generale (Maria Cristina Morandini, Giuseppe Zago e Monica Galfré) integrati da sondaggi su specifiche questioni legate all'educazione di soggetti disabili (Anna Debé, Catia Giacconi, Roberta Caldin).

Quegli aggrovigliati anni Ottanta

Vangati e rivangati i territori occupati dalla memoria dei protagonisti e dalla ricostruzione storiografica degli anni Sessanta e Settanta (con la recente ghiotta occasione dei 50 anni trascorsi dal Sessantotto) giungono ora alla ribalta dell'interesse storico gli anni Ottanta, dal profilo certamente meno glorioso e celebrato rispetto ai due decenni precedenti, ma non privi di suggestioni, testimoni di qualcosa che sembrava finito – la grande e totalizzante passione per la politica – e, a loro volta, scenario di una incipiente trasformazione segnata dall'approdo a un mondo nuovo, interconnesso e globale. Agli anni Ottanta porge l'attenzione in un denso volume concepito tra autobiografia e riflessione culturale con forti accenti storico educativi Adolfo Scotto di Luzio (*Nel groviglio degli anni Ottanta. Politica e illusione di una generazione nata troppo tardi*)⁶.

L'autore svolge la propria indagine, proponendosi di rispondere a qualche essenziale domanda: qual è stata la storia dei bambini nati da genitori cresciuti nel benessere post bellico e coinvolti, in modo o nell'altro, nelle vicende degli anni della contestazione e degli anni di piombo? Lungo quali strade si sono poi messi in cammino, con chi e cosa hanno dovuto confrontarsi? Quali i rapporti con la generazione precedente, con quel Sessantotto in particolare che così

⁶ A. Scotto di Luzio, *Nel groviglio degli anni Ottanta. Politica e illusione di una generazione nata troppo tardi*, Torino, Einaudi, 2020.

prepotentemente ha occupato gran parte dell'orizzonte della loro formazione? I ragazzi dell'85 hanno davvero passivamente interpretato il ritorno al privato con il prevalere dell'apparire rispetto all'essere?

In questa breve segnalazione non è possibile rendere conto della ricchezza delle tematiche discusse e delle argomentazioni proposte. Il libro tocca infatti molteplici (e spesso controversi) aspetti delle trasformazioni in atto: i riti musicali celebrati nei concerti, i viaggi come iniziazione all'età adulta, la nuova fisionomia della vita di coppia e la lenta erosione della concezione tradizionale della famiglia, il dilagare delle droghe pesanti, il consumismo sempre più diffuso, il movimento studentesco della Pantera così diverso dal modello sessantottino e molto altro ancora.

In questa sede desidero soltanto richiamare l'originalità – mista a qualche inevitabile rischio – dell'impianto storiografico scelto da Scotto di Luzio: un esempio di come si possa fare storia anche pedagogica partendo dalla quotidianità materiale ed emotiva, dalla circolazione dell'immaginario giovanile e dalle sue incertezze e fragilità. L'autore si affida infatti a una narrazione basata su fonti fluide, ricordi memorialistici e accompagnata da biografie contraddittorie che scandirono l'entrata nel mondo degli adulti di una generazione che – ormai maturati oggi i 50-60 anni – si porta addosso lo stigma della «generazione del riflusso».

Contributi su Giuseppe Lombardo Radice

Il nome di Giuseppe Lombardo Radice ricorre ormai quasi esclusivamente tra gli studiosi di storia pedagogica e scolastica e viene ricordato soprattutto per la riforma dell'istruzione elementare del 1923 e la sua drammatica resistenza al fascismo. La sua riflessione sembra ormai appartenere ad un mondo morto e sepolto. È davvero un grande peccato che la miniera di saggezza educativa e di proposte didattiche che costellano i suoi testi (in primo luogo le *Lezioni di didattica* del 1912) sia esplorata in misura inadeguata rispetto a quanto meriterebbe. Per felice coincidenza e quasi a smentire il mio rammarico sono usciti negli ultimi mesi tre importanti contributi.

Il primo è l'edizione critica di un piccolo, ma assai significativo testo del 1915, *Come si uccidono le anime*⁷ che Lorenzo Cantatore introduce con un eccellente saggio. Perché si uccidono le anime (sottinteso: degli alunni)? Perché – risponde Lombardo Radice – la vita nelle scuole è spesso conformista e abitudinaria, stanca ed inefficace, talvolta ritagliata su modelli antiquati, gestita da insegnanti superficialmente lassisti, culturalmente lontani dall'attenzione che occorrerebbe riservare al presente. L'intento del libro è quello di opporre alla

⁷ G. Lombardo Radice, *Come si uccidono le anime*, a cura di L. Cantatore, Pisa, Ets, 2020.

«scuola che uccide le anime», un'altra scuola che invece le vitalizzi, le renda libere e capaci di sensibilità critica, di curiosità intellettuale. Scorre nelle fresche pagine del pedagogo catanese l'allarme per la pigrizia di molti educatori che non sanno o non voglio coltivare i talenti dei loro alunni e «insegnano sempre nella stessa maniera».

Sono trascorsi più di cent'anni e tante pagine di questa piccola opera ci sembrano scritti con riflessioni tuttora validissime, specialmente in ordine al ruolo centrale e umano dell'insegnante, un fattore decisivo sulla qualità scolastica molto più che – oggi diremmo – dei protocolli collaudati dalla sperimentazione scientifica (pur anch'essi, beninteso, necessari). Se non si dispone, infatti, di insegnanti che credono nella scuola, che amano i loro allievi e concepiscono la loro professione come un delicato compito sociale (e non un impiego come tanti altri) è difficile pensare a un'educazione scolastica più incisiva e realmente capace di dialogare con le aspettative dei giovani. E invece da almeno mezzo secolo la politica (complici i sindacati) ha purtroppo dimenticato gli insegnanti e la loro formazione (con la sola eccezione del corso di laurea per i maestri) e si è limitata a concepire la scuola come una specie di ammortizzatore sociale per dare lavoro ai laureati senza occupazione.

Il secondo contributo è la pubblicazione delle lettere di Giuseppe Lombardo Radice ad Adolphe Ferrière ritrovate da Gabriella D'Aprile negli archivi dell'Institut J.J. di Ginevra (*Memorie di una inedita corrispondenza. Lettere di Giuseppe Lombardo Radice ad Adolphe Ferrière*⁸) e ottimamente presentate. Esse forniscono nuovi elementi per meglio conoscere un sodalizio professionale e quasi amicale ben noto. Ricomprese tra il gennaio 1924 e il luglio 1931 esse si inquadrano entro un momento fondamentale della vita del pedagogo siciliano, spaziando dagli ultimi mesi della sua esperienza ministeriale fino in pratica alla sua uscita di scena imposta dal fascismo (le ultime lettere trasudano scoramento per ragioni facilmente intuibili oltre che per problemi familiari).

La parte più cospicua della corrispondenza riguarda il biennio 1926-1927, fornisce ragguagli sulla pubblicazione del volume del Ferrière *L'aube de l'école sereine en Italie* (compreso il contributo finanziario dell'Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia che sorresse la pubblicazione), notizie sul congresso di Locarno promosso dagli animatori del movimento dell'*éducation nouvelle* al quale avrebbe dovuto partecipare anche Lombardo Radice ma a cui rinunciò per evitare strumentalizzazioni politiche. Più in generale molto interessanti sono gli scambi di informazioni bibliografiche, segnalazioni di persone impegnate in attività sperimentali, ipotesi di reciproche collaborazioni su cui purtroppo non disponiamo delle responsive di Ferrière andate, per quanto si sa, presumibilmente perdute.

⁸ G. D'Aprile, *Memorie di una inedita corrispondenza. Lettere di Giuseppe Lombardo Radice ad Adolphe Ferrière*, Pisa, Ets, 2020.

Un ulteriore apporto utile per riscoprire, a 140 anni di distanza dalla nascita, Giuseppe Lombardo Radice giunge dalla rivista «Formazione, lavoro, persona» (2020/32) con una nutrita batteria di saggi dedicati a *Giuseppe Lombardo Radice fra Pedagogia serena e Critica didattica*⁹ che ne rilanciano la figura di pedagogista e uomo di scuola riletta secondo varie angolazioni. Spiccano i saggi di alcuni degli studiosi che più recentemente si sono confrontati con la pedagogia e la militanza scolastica dello studioso siciliano (lo stesso Lorenzo Cantatore, Gabriella D'Aprile, Andrea Dessardo, Evelina Scaglia e Maria Tomarchio) affiancati da altri studiosi (in particolare segnalo i contributi di Mirca Benetton e Sara Nosari) interessati a coglierne i motivi che ancora ne rendono meritevole di attenzione la proposta educativa.

L'iniziativa di approfondire il messaggio di Lombardo Radice è tanto più meritoria quanto più si è smarrito il suo insegnamento che per oltre mezzo secolo ha scandito la storia scolastica italiana. Dalle *Lezioni di didattica* in poi il puerocentrismo lombardiano ha difatti influenzato l'opinione magistrale, orientato i programmi di insegnamento, accompagnato i maestri nella preparazione dei concorsi magistrali e fornito le basi per il rinnovamento delle pratiche per l'insegnamento della lettura e della scrittura in specie e, più in generale, dell'insegnamento linguistico e scientifico.

Dalle pagine dell'introduzione di Cantatore al volumetto del 1915 emerge la lunga scia che Lombardo Radice lasciò dietro di sé – anche attraverso le opere di suoi devoti e diretti discepoli come Francesco Bettini e Giorgio Gabrielli – almeno fino agli anni '60 e '70, incidendo in vario modo non solo su un tratto di “pedagogia ministeriale” (fino ai Programmi per la scuola elementare del 1955), ma anche su alcune delle esperienze più significative che hanno accompagnato il passaggio verso la scolarità diffusa: Maria Maltoni e i quaderni degli alunni di San Gersolé che conquistarono l'ammirazione di Italo Calvino, Mario Lodi, Loris Malaguzzi, le trasmissioni di “Non è mai troppo tardi” di Alberto Manzi e Carlo Piantoni, gli incontri dei maestri sperimentatori di Pietralba.

Poi tra gli anni '60 e '70 il tramonto, il prevalere delle psicopedagogie di matrice anglosassone, lo scarso interesse verso la memoria pedagogica.

Le leggi razziali

Segnalo infine l'uscita sulla «Rivista di storia dell'Educazione» (2019/2) del fascicolo monografico dedicato alla rilettura in chiave storico-educativa delle leggi razziali in Italia a 80 anni dalla loro promulgazione¹⁰. Iniziativa quanto

⁹ *Giuseppe Lombardo Radice fra Pedagogia serena e Critica didattica*, «Formazione, lavoro, persona», vol. 32, 2020.

¹⁰ Numero monografico, «Rivista di storia dell'Educazione», vol. 6, n. 2, 2019, pp. 7-213.

mai opportuna per non dimenticare una delle pagine più vergognose della storia italiana. Oltre alla prefazione di Liliana Segre e al saggio introduttivo di Michele Sarfatti (*La persecuzione antiebraica fascista nelle scuole e nell'università*) il fascicolo ospita una serie di scritti con l'obiettivo di mettere a fuoco la varietà e complessità delle implicanze che, a partire da questa tragica legislazione, hanno coinvolto in primo luogo la scuola, istituzione ritenuta di centrale importanza nell'ideologia totalitaria del regime fascista, alla quale affidare il compito essenziale di plasmare le coscienze individuali all'interno di una ideologia profondamente intrisa di componenti razziste.

Con la collaborazione di storici, storici dell'educazione e pedagogisti (David Salomoni, Marco Impagliazzo, Giuseppe Tognon, Silvia Guetta, Martino Oppizzi, Giulia Simone, Furio Pesci, Giulia Dodi, Enrico Palumbo, Carla Roverselli) vengono esplorati il lento consolidarsi dell'antisemitismo e del razzismo in Italia, in Europa e negli Stati Uniti, le disposizioni legislative, accuratamente preparate negli anni precedenti al 1938 dal regime fascista che diedero avvio, come è noto, all'inizio delle persecuzioni del mondo ebraico italiano, le conseguenze patite nella vita quotidiana da famiglie e bambini.

A questo fascicolo viene bene associare il volume *Vietato studiare, vietato insegnare. Il Ministero dell'educazione nazionale e l'attuazione delle norme antiebraiche 1938-1943* (a cura di V. Iossa e M. Gianfrancesco, Roma, Palombi)¹¹ che raccoglie la normativa (leggi, decreti, regolamenti, circolari, bandi di concorso) attraverso cui, dopo il 1938, è stato possibile attuare la decisione di escludere tutti gli ebrei (docenti, allievi, personale amministrativo) dal mondo dell'istruzione. Oltre 700 norme pubblicate nel «Bollettino ufficiale del Ministero dell'Educazione Nazionale» che di punto in bianco diventarono la realtà della vita di migliaia di italiani che si trovarono fuori dalle loro scuole, dalle aule universitarie, dai loro posti di lavoro.

¹¹ V. Iossa, M. Gianfrancesco (edd.), *Vietato studiare, vietato insegnare. Il Ministero dell'educazione nazionale e l'attuazione delle norme antiebraiche 1938-1943*, Roma, Palombi, 2019.

La narrativa per bambini e ragazzi tra finzione e realtà. Un originale percorso di ricerca

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The narrative for children and young people between fiction and reality. An original research path

ABSTRACT: This work aims to analyse the recent and original research work initiated by Chiara Lepri on the role of the lie within literature for children and youth between the modern and contemporary ages. In particular, through the analysis of a large number of texts, the author reconstructs the history of the lie within the most significant literary works of the Western tradition.

EET/TEE KEYWORDS: Children's Literature; Literature; Fiction; Europe; XVIth-XXIst Centuries.

Indagare la bugia e ricostruirne la sua storia accidentata attraverso lo sguardo particolare e disincantato della letteratura per l'infanzia e per la gioventù, da sempre luogo privilegiato del fantastico e della metamorfosi delle rappresentazioni sociali dell'infanzia. Una sfida affascinante e originale che Chiara Lepri raccoglie e fa sua nel recente lavoro dal titolo *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*¹, opera che senza dubbio può essere considerata una raffinata rilettura reticolare di autori, opere e personaggi della letteratura giovanile dell'età moderna e contemporanea alla luce di una innovativa chiave interpretativa. Grazie ad un attento scavo letterario e ad una prosa avvolgente e di notevole ricchezza lessicale, l'autrice si propone infatti di indagare la storia della bugia lungo due piani paralleli ma convergenti nello stesso tempo: quello della letteratura stessa come bugia o finzione e quello

¹ C. Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, Ospedaletto (Pisa), Pacini editore, 2020.

della bugia nell'immaginario letterario, rivolgendosi soprattutto in quest'ultimo caso uno sguardo attento alla narrativa specializzata per bambini e ragazzi, ambito fortunato dello sviluppo della fantasia e dell'immaginazione, dove, con assidua frequenza, trova accoglienza la figura del cosiddetto «personaggio menzognero»².

La bugia, del resto, come ben sottolineato da Flavia Bacchetti nel saggio introduttivo al volume, è connaturata all'umanità stessa e si presenta quale schermo rappresentativo dell'intera vita dell'uomo e come tale si protende in diversi campi, da quello artistico (teatrale o cinematografico che sia) a quello filosofico sino al letterario, quale perfetta «mistificazione della realtà nonché manomissione volontaria di elementi che dai perimetri della realtà talvolta sconfinano in quelli della fantasia, ossia nella dimensione meta-reale»³.

Senza trascurare affatto alcuni noti e validi lavori che hanno indagato in maniera trasversale il ruolo e la rilevanza della menzogna e della finzione in ambito letterario⁴ e partendo dall'assunto di base che la storia della bugia si intrecci da sempre con la storia dell'uomo, delle società, delle culture e delle religioni che hanno accompagnato lo sviluppo dell'umanità stessa, Chiara Lepri decide di concentrare principalmente la propria analisi sul tema della menzogna all'interno di una letteratura per l'infanzia che nel corso dei secoli è divenuta sempre più «specchio del reale nella rappresentazione di personaggi autentici»⁵. Nelle sue più recondite e poliedriche sfaccettature la bugia finisce così per rappresentare un elemento letterario inscindibile dal genere stesso, forse proprio, come osserva la stessa autrice, «per la commistione di istanze e elementi reali – anche espressi in forma metaforica o parodica – ed elementi fantastici, di pura invenzione, che in esso sono contenuti»⁶.

Nel suo privilegiare la bugia infantile l'analisi dell'autrice su verità e menzogna, oltre a prendere in esame il piano etico della questione, tenta anche, con notevole ed innovativa capacità ermeneutica, di mostrare una «fenomenologia della bugia spesso originata nel 'contraddittorio' col mondo adulto, ma anche come espressione trasgressiva e liberatoria per la difesa di un luogo del desiderio»⁷.

² *Ibid.*, p. 25.

³ F. Bacchetti, *La bugia: prolungamenti e intersezioni. Saggio introduttivo*, in *ibid.*, cit., pp. 9-24 (cit. a p. 9).

⁴ Sul tema della «menzogna letteraria» si vedano, tra gli altri, i sempre validi lavori: G. Celati, *Finzioni occidentali. Fabulazione, comicità e scrittura*, Torino, Einaudi, 1986; S. Albertazzi, *Bugie sincere. Narratori e narrazioni 1970-1990*, Roma, Editori Riuniti, 1992; M. Lavagetto, *La cicatrice di Montaigne. Sulla bugia in letteratura*, Torino, Einaudi, 1992; M. Bettetini, *Breve storia della bugia. Da Ulisse a Pinocchio*, Milano, Raffaello Cortina, 2001. Si veda inoltre C. Covato (ed.), *Vizi privati e pubbliche virtù. Le realtà nascoste nelle pedagogie narrate*, Milano, Guerini scientifica, 2010 che prende in esame il conflitto esistente nella storia dell'educazione fra essere e apparire, fra etiche di riferimento e comportamenti reali.

⁵ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 196.

⁶ *Ibid.*, p. 197.

⁷ *Ibid.*, p. 26.

Le opere e gli autori che finiscono sotto la lente di ingrandimento della Lepri sono presentati secondo un ordine diacronico che dall'età moderna giunge fino ai giorni nostri e danno vita ad un percorso storico e culturale lungo il quale è posta in rilievo una rappresentazione fluida ed *in itinere* della bugia, che si manifesta attraverso i comportamenti dei personaggi e i giudizi stessi, più o meno espliciti, dell'autore. Così, durante questo intricato viaggio letterario che si dipana nei secoli, accanto a celebri bugiardi che mostreranno di mentire per il semplice gusto dell'assurdo o come sfida ai pericoli della ragione, sarà facile imbattersi in mentitori che sceglieranno la via della bugia per ristabilire la verità o, addirittura, per rovesciare le "finzioni" dei grandi e sovvertire così una logica talvolta troppo seria e opprimente e poco incline a valorizzare la forza dell'immaginazione.

Tali fantasiose narrazioni esercitano di fatto una notevole forza attrattiva nel "lettore adulto" ma anche, e soprattutto, nel "lettore bambino". L'invenzione di una realtà alternativa o la creazione di percorsi fantastici fanno parte di un repertorio inesauribile di falsità che il bambino è portato per sua natura a mettere in atto⁸. Del resto, è noto come la bugia e la menzogna, sin dai primi anni di vita di ciascun individuo, possano essere considerati a buon diritto «lo spazio della fantasia», nel quale il bambino, prima ancora di assumere consapevolezza dell'utilità pratica del mentire, appaga il proprio piacere e l'innato desiderio di libertà dell'uomo, soprattutto attraverso «la possibilità di creare una realtà altra che risulti più aderente ai propri impulsi e desideri e contribuisca a mantenere lontane le angosce»⁹. Perché, osserva bene la Lepri, la bugia è qualcosa che si scontra «con la verità condivisa, la elabora, la ciruisce, la sposta, la trasforma, la divide o la moltiplica con il preciso scopo di narrare altro dal reale»¹⁰. Sono proprio le bugie ad avere la caratteristica di essere verosimili, cioè il più possibile simili al vero che ciascuno di noi intende nascondere ed è proprio un eccesso di verità, molto spesso, a soffocare la bugia, che per crescere ha bisogno di un territorio molto più naturale e pertanto corredato da elementi di veridicità. Non a caso, ed è questo un *leit motiv* che nell'analisi condotta dalla Lepri ritorna molto di frequente, nelle varie opere letterarie esaminate i mentitori «più abili» si impegnano per rendere le loro menzogne il più possibile veridiche ed hanno una particolare capacità nell'indagare con attenzione la mente del proprio interlocutore, poiché «la bugia è ancora più efficace quando corrisponde alle aspettative di chi l'ascolta»¹¹.

La selezionata panoramica di bambini o adolescenti del mondo letterario per l'infanzia e la gioventù presentata nel volume in oggetto è quanto mai ricca e variegata. Nella rassegna di Chiara Lepri si alternano e si avvicinano pertanto

⁸ Si veda in proposito A. Faeti, *I tesori e le isole. Infanzia, immaginario, libri e altri media*, Firenze, La Nuova Italia, 1986.

⁹ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 27.

¹⁰ *Ibid.*, p. 35.

¹¹ *Ibid.*

sia giovani abili nel mentire e capaci pertanto di creare scenari diversi da quelli esistenti al fine di compensare le carenze della realtà ma anche di sfuggire al controllo dei grandi, sia bambini che a loro volta sono vittime delle bugie altrui, dell'inautenticità degli adulti e degli inganni di chi detiene il potere. I protagonisti delle varie opere sono inclini a disobbedire, a fuggire, a mettere in crisi l'ordine costituito e norme ben consolidate, anche se, non di rado, il loro comportamento prende le mosse proprio dal conflitto inevitabile con il mondo adulto.

Così, ad esempio, nel primo capitolo (*Letteratura, fiction, bugia*), in un riuscito abbraccio tra letteratura, filosofia, cinema e altre arti visive, dopo un accattivante *excursus* sul ruolo della bugia nei secoli all'interno della società e nelle varie forme rappresentative e la ridefinizione della figura del «bugiardo letterario», ben teorizzata da Emilio Garroni¹², si ergono a protagoniste le settecentesche riflessioni morali del *Robinson Crusoe* di Daniel Defoe e quelle coeve satiriche del *Gulliver* di Jonathan Swift¹³ che, naturalmente, devono anch'esse fare i conti con il mondo della menzogna e della bugia. Nel primo caso a guadagnarsi il proscenio è l'uomo onesto per eccellenza, quel naufrago che, approdato su un'isola deserta, riesce a procurarsi e a costruirsi comunque tutto ciò che gli serve per la sopravvivenza; colui che «non saprebbe mentire» si scaglia con violenza verso il «parlare menzognero» che diventa il «parlare osceno e volgare»¹⁴, proprio di un mondo, assai lontano da quello dell'isola in cui è naufragato Robinson, che ha deciso di mandare in crisi i veri valori della società, intento com'è soltanto «a produrre e scambiare»¹⁵.

Dal canto suo, invece, il navigatore *Gulliver* si accorge davvero della pericolosità e della malvagità della bugia quando entra a contatto, nel suo quarto viaggio, con lo straordinario paese degli Houyhnhnm. Dopo aver già visitato Lilliput, Brobdingnag e l'isola volante di Laputa, il personaggio creato da Swift arriva in uno straordinario paese popolato da saggi e civili cavalli, le cui qualità morali sono indubbie ed in netto contrasto con quelle dei ripugnanti Yahoo, una sorta di sottorazza umana e, più in generale, metafora del mondo degli uomini. Nei virtuosi cavalli la menzogna diventa causa di forte imbarazzo tanto che nella loro lingua non esistono parole che esprimano i concetti di falsità e «la cosa che non è equivale a sbagliare»¹⁶. In questo mondo «eticamente dorato» la bugia non esiste ed è anche inutile in quanto renderebbe vano l'uso della parola, in una situazione totalmente opposta rispetto a quella riscontrabile nella società umana dalla quale Gulliver proviene, dove invece i rapporti sociali e le più

¹² Si veda E. Garroni, *Osservazioni sul mentire e altre conferenze*, Roma, Alpes, 2013.

¹³ Per un'analisi su entrambi i testi e i rispettivi autori si veda A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, 2 voll., Milano, FrancoAngeli, 2017, Vol. 1, pp. 257-263.

¹⁴ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 54.

¹⁵ *Ibid.*, p. 56.

¹⁶ *Ibid.*, p. 57.

banali regole di convivenza sono dettati principalmente dalle convenzioni e dalla falsità, e per la quale, al rientro dai suoi viaggi, egli proverà solo disgusto.

La riflessione sulla bugia letteraria connessa al tema del doppio e del rovesciamento è altro campo che Chiara Lepri riesce ad indagare con assoluta padronanza degli strumenti interpretativi. Protagonisti in tal senso diventano icone ottocentesche della letteratura internazionale quali Oscar Wilde e Lewis Carroll, i quali, in alcune tra le loro opere più celebri, si divertono con successo a rovesciare, grazie al fortunato binomio bugia-fantasia, ogni schema tradizionale e prestabilito. Entrambi riescono a dar vita a forme narrative che esercitano una particolare attrattiva nel lettore adulto ma anche, e soprattutto, nel lettore bambino.

Così, ad esempio, ne *Il fantasma di Canterville*, vera e propria *ghost story* invertita e ridicolizzata, si realizza la più classica delle parodie delle convenzioni che attua i principi del rovesciamento parodico ma che, nel suo epilogo, dopo il trionfo assoluto della dimensione umoristica, celebra comunque il «fallimento della bugia quale spinta propulsiva della creatività e dell'invenzione»¹⁷. In *Alice in Wonderland*, invece, come nella maggiorparte delle opere carrolliane, la bugia non costituisce un problema, bensì diventa un'occasione molto efficace per arricchire la realtà di elementi più gradevoli e divertenti, nonché un canale privilegiato per comunicare con i bambini. I significati sono rovesciati, le convenzioni morali o linguistiche che siano finiscono per essere apertamente derise, il mondo è assolutamente capovolto a dispetto di una logica che gli adulti accettano solo passivamente. Del resto, è noto come una delle caratteristiche precipue e più apprezzate dell'autore vittoriano sia proprio la sua straordinaria capacità di porsi al livello dei lettori più piccoli attraverso un linguaggio che diventi specchio fedele della loro fervida immaginazione¹⁸.

La bugia, naturalmente, nei suoi infiniti rivoli, fa capolino nei più letti e conosciuti classici per l'infanzia dell'età moderna e contemporanea, bagaglio culturale ormai ben consolidato in lettori giovani e meno giovani della società occidentale. Nel secondo capitolo del suo volume (*La bugia nei classici per l'infanzia*) Chiara Lepri decide dunque di passare in rassegna una galleria di personaggi letterari che hanno avuto modo di vivere a stretto contatto con il mondo della menzogna e della finzione. E se per il cinquecentesco e picaresco *Lazarillo de Tormes*¹⁹ la bugia è un vero e proprio stratagemma per sopravvivere, elemento connaturato ad un *modus vivendi* ritenuto necessario dallo stesso mondo adulto al fine di potersi difendersi dagli inganni e dai numerosi tranelli

¹⁷ *Ibid.*, p. 63.

¹⁸ Si veda G. Rodari, *I bambini e la poesia*, in *Il cane di Magonza*, Roma, Editori Riuniti, 1981.

¹⁹ *Le avventure di Lazarillo de Tormes*, Testo anonimo del secolo XVI, trad. di S. Pizzorno, Giunti-Marzocco, Firenze, 1971, p. 3. Il racconto in oggetto non nasce per essere destinato ai piccoli lettori ma le numerose edizioni pubblicate nel corso del Novecento, anche sul versante scolastico, ne hanno fatto un classico della letteratura per l'infanzia di età moderna.

in cui è facile cadere se ingenui e sprovveduti, per il quanto mai affascinante e bizzarro *Barone di Münchhausen*²⁰ è un gioco da ragazzi deformare all'eccesso la verità per dare spazio ad una bugia che diventa gratuita e paradossale. Ma anche in questo caso non è ravvisabile alcuna volontà di utilizzare la menzogna per ingannare qualcuno con una finalità criminosa. Scopo del protagonista del romanzo di Raspe, che trae spunto dalle vicende di un barone realmente vissuto nel Settecento e che prese parte alla guerra russo-turca in un reggimento di corazzieri, non è infatti quello «malevolo dell'inganno di indurre in errore, bensì quello di sconvolgere la realtà così com'è, troppo insipida per essere raccontata»²¹. Siamo davanti a quella che Mario Lavagetto ha opportunamente definito la cosiddetta «bugia circolare», che consiste nel costruire l'incredibile sull'incredibile: nelle storie narrate le bugie si susseguono e si moltiplicano, si autoproducono l'una dall'altra e nell'altra, in una successione quanto mai improbabile ma che ha il risultato di produrre una comicità tanto surreale quanto affascinante per il lettore²².

Su un piano completamente diverso da quello fantastico ed iperbolico si muovono invece le avventure di due «ragazzi terribili» della letteratura per l'infanzia, quali Tom Sawyer e Huckleberry Finn, narrate in due opere assai note di Mark Twain risalenti alla fine del 1800²³. È la brillante penna dello scrittore americano, abile ad esaltare il bambino ribelle, spontaneo e irrequieto in fuga da un mondo dei grandi spesso troppo rigido e talvolta ingiusto, a dar vita al primo tentativo di rappresentare l'insofferenza dell'infanzia rispetto alle costrizioni dell'epoca coeva. Tom e Huck, adottando un atteggiamento assai diverso rispetto agli omologhi eroi della letteratura per l'infanzia ottocentesca europea²⁴, daranno così libero sfogo alla loro sete di evasione attraverso vere e proprie fughe e divertenti identificazioni con personaggi della fantasia.

Il vivace e fantasioso Tom, inserito in un contesto borghese, utilizza un vasto repertorio di astuzie e di piccoli imbrogli alla maniera di un discolo dei giorni nostri o per gioco o per il semplice gusto di disobbedire e farsi grande agli occhi degli amici, quasi a volersi ingegnare quotidianamente per rendere la quotidianità più piacevole attraverso una serie di esilaranti bugie atte a divertire, giocare e dissacrare la abitudini del tranquillo paese americano sulle rive del Mississippi in cui vive. Il vagabondo Huckleberry, invece, fuggito alle persecuzioni di un padre alcolizzato e violento e pertanto inserito in un contesto decisamente più drammatico, decide di ricorrere costantemente a complicate

²⁰ Su quest'opera si veda P. Citati, *I viaggi di Munchausen*, in R.E. Raspe, *Le avventure del barone di Münchhausen*, Milano, Bur, 2000.

²¹ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 86.

²² Si veda Lavagetto, *La cicatrice di Montaigne. Sulla bugia in letteratura*, cit., p. 61.

²³ Mark Twain pubblicò nel 1876 *Le avventure di Tom Sawyer* e nel 1884 *Le avventure di Huckleberry Finn*.

²⁴ Si pensi, ad esempio, all'Alice di Carroll che abbandona il mondo della vita quotidiana solo in sogno per evadere dalla società vittoriana e fuggire nel Paese delle Meraviglie.

macchinazioni soprattutto per sopravvivere o mettersi in salvo durante le sue spericolate avventure. Entrambi i ragazzi, pur agli antipodi per molti aspetti, vivono esperienze entusiasmanti a contatto con un'umanità selvaggia e truffaldina e ricorrono all'utilizzo della bugia non per procurare dolore né con l'intento di fare del male, bensì per un fine "quasi" legittimo, accomunati «da un'incredibile capacità di utilizzare al momento opportuno la cosiddetta 'bugia di destrezza quotidiana', quella utile per sfuggire al pesante controllo degli adulti o per 'cavarsela' in caso di necessità»²⁵.

Ovviamente, in un volume che ha il suo cuore pulsante nell'esame della presenza della bugia nella letteratura per l'infanzia, ampia trattazione non poteva non essere dedicata a *Le avventure di Pinocchio* di Carlo Collodi, il cui protagonista, il celeberrimo burattino di legno, può essere considerato a ragione il bugiardo per antonomasia nell'immaginario infantile di tutto il mondo²⁶. Sulla scia dell'avventuroso Lazarillo o del fuggiasco Huckleberry, Pinocchio rappresenta l'idea dell'eterno discolo la cui caratteristica dominante è «l'incapacità di calcolare la portata e la conseguenza delle proprie azioni»²⁷. Il burattino, tuttavia, non è affatto cattivo e le sue bugie non hanno nulla di particolarmente iperbolico ma spesso si rivelano infantili e assolutamente gratuite, maledette dal fatto di non poter essere nascoste a causa di quel naso "impertinente" che tradirà il suo padrone allungandosi al pronunciare di ogni menzogna. Il protagonista di Collodi è ostinato nel suo errore nella misura in cui cerca disperatamente di appagare il suo irrefrenabile desiderio di libertà e di spensieratezza, quasi una sorta di fuga dalle responsabilità.

Ma Pinocchio non è l'unico a mentire nell'opera di Collodi. Anzi. La bugia, di fatto, è alla base di tutta l'opera: tutti mentono, tutti sono diversi da quello che dicono di essere, tutto appare ciò che non è. Nel fortunato romanzo pubblicato la prima volta a puntate sulle pagine del «Giornale per i Bambini» di Ferdinando Martini²⁸, accanto alle fandonie raccontate dall'omino di legno creato da Geppetto, è possibile così riscontrare anche un altro tipo di menzogne e di inganni, che nel romanzo, osserva bene Chiara Lepri, «si insinuano sotto varie forme, a partire dalla profonda ambivalenza che caratterizza ciascun personaggio adulto sino a divenire una macroscopica costante costitutiva di

²⁵ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 94.

²⁶ Sul *Pinocchio* di Collodi si veda in particolare Ascenzi, Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, cit., Vol. 2, pp. 123-169.

²⁷ A. Asor Rosa, «*Le avventure di Pinocchio. Storia di un burattino*» di Carlo Collodi, in *Genus italicum: saggi sulla identità letteraria italiana del nostro tempo*, Torino, Einaudi, 1997, p. 585.

²⁸ Su il «Giornale per i Bambini», diretto da Ferdinando Martini, si vedano F. Loparco, *Ferdinando Martini e la direzione del «Giornale per i Bambini» in alcuni documenti inediti (1881-1889)*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 757-779 e Ead., «Boys of England», «The Boy's Own Paper», and the English influence in the Italian «Giornale per i Bambini», «History of Education & Children's Literature», vol. IX, n. 2, 2014, pp. 419-443.

tutto il racconto»²⁹. Ecco dunque che il burattino-monello non è solo colui che mente ma è a sua volta la vittima “predestinata” degli inganni e della disonestà altrui. Si pensi, tra i numerosi personaggi “mentitori e ingannevoli” presenti nel libro³⁰ e che Pinocchio incontra nel suo percorso di crescita, ad alcune figure chiave e ormai ben radicate nell’immaginario comune. Tra questi, ad esempio, il Gatto e la Volpe che mentono ripetutamente e lo fanno con consapevolezza e senza scrupoli ma con l’obiettivo tuttavia molto modesto di uscire dalla più squallida povertà in cui versano e di arricchirsi alle spalle dello sventurato e credulone burattino; o l’Omino di burro che guida il carro diretto al Paese dei Balocchi, un vero e proprio adescatore di anime innocenti, colui che non può essere considerato un “imbrogliatore da strapazzo” come il Gatto o la Volpe, bensì un personaggio che fa della fraudolenza la propria attività imprenditoriale. Figura tanto affascinante quanto ambigua, infine, secondo l’interessante lettura proposta da Chiara Lepri, è quella della Fata dai capelli turchini, che se da un lato rappresenta la «proiezione materna», i buoni sentimenti in cui rifugiarsi e trovare perdono, dall’altro, anch’ella non disdegna dal ricorrere all’utilizzo della bugia, utilizzata però a fin di bene, una menzogna che Manganelli ha giustamente definito dal «sapore pedagogico»³¹ poiché contribuisce ad impartire un insegnamento di vita quanto mai efficace.

Una finzione assai diversa da quella collodiana è invece il tipo di menzogna di cui si serve Lyman Frank Baum nel suo celeberrimo *Il meraviglioso Mago di Oz*³², un racconto che rifugge da ogni moralismo ed intento didascalico ma che ancora oggi, a distanza di oltre cento anni dalla sua pubblicazione e dopo aver superato il feroce ostracismo ideologico di una certa parte della critica novecentesca per la sua presunta morale rinunciataria e accomodante nei confronti della vita, rappresenta una delle opere più lette e conosciute della letteratura per l’infanzia internazionale. Alle avventure o ai racconti di ambientazione storico-realistica di Twain l’autore statunitense preferisce la soluzione della fiaba moderna di ispirazione fantastica. Anche in quest’opera, neanche a dirlo, la menzogna e la bugia finiscono per assumere un ruolo di primo piano ma questa volta non sarà uno strumento utilizzato dalla giovane protagonista Dorothy per raggiungere il proprio obiettivo, piccolo o grande che sia, bensì apparterrà ad un personaggio del mondo adulto e che si presenta come una figura molto potente e considerata: il misterioso e terribile Mago di Oz. Il signore della apparentemente rigogliosa Città di Smeraldo, colui che viene descritto da tutti come l’unico capace di soddisfare i desideri di ogni essere, con un clamoroso *coup de théâtre* degno della migliore tradizione giallista, si rivelerà in realtà un vile imbrogliatore che ha costruito la propria fortuna sulla bugia e

²⁹ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 119.

³⁰ *Ibid.*, pp. 129-136.

³¹ G. Manganelli, *Pinocchio: un libro parallelo*, Torino, Einaudi, 1977, p. 71.

³² L.F. Baum, *Il meraviglioso Mago di Oz*, trad. it. di M. D’Amico, Milano, Mondadori, 2001.

sulle falsità. Con il Mago di Oz la bugia è al potere ma il grande bugiardo che muove i fili dei suoi sudditi non è altro che un «povero ometto costretto a mentire per nascondere le proprie debolezze»³³.

Ad arricchire ulteriormente e nello stesso tempo a rendere veramente completo l'assai apprezzabile lavoro di ricerca di Chiara Lepri contribuisce senza dubbio l'ultimo capitolo proposto (*Uno sguardo al Novecento*), nel quale l'autrice si concentra sulla presenza e sul ruolo della menzogna nei contributi della narrativa per l'infanzia più recente³⁴. La riflessione prosegue pertanto nel tratteggiare, con le loro identità e motivazioni, alcuni «bugiardi letterari» più vicini a noi, grazie all'atteggiamento dei quali è possibile affermare che nella letteratura per l'infanzia e l'adolescenza del Novecento la bugia si consolida come ambito di gioco, di ribaltamento e dunque come strumento "eversivo". Come ben sottolinea la Lepri, gli sviluppi della narrativa più recente «guardano alla bugia in modo più indulgente: le fantasticherie, le vanterie, le fabulazioni sono connaturate al mondo dell'infanzia, che confonde bugia, gioco e fantasia; in questa accezione, la bugia rappresenta uno spazio di creazione fantastica»³⁵ che risponde ad un «bisogno profondissimo del bambino: quello di non contentarsi della propria vita»³⁶.

In questo contesto si cala perfettamente la figura di Pippi Calzelunghe, nata dalla penna felice di Astrid Lindgren³⁷ intorno alla metà del Novecento. La bambina dal carattere straordinariamente gioioso e ottimista, che si arrangia nella vita di tutti i giorni con la scaltrezza di chi è stato precocemente lasciato a se stesso, ricorre con frequenza alla bugia senza alcuna pretesa di nuocere a qualcuno o di ingannare per puro scopo di lucro. Le sue bugie, al contrario, spesso plateali e quasi gratuite, nascono da una «fervida immaginazione che consente [a Pippi] di sdrammatizzare la propria condizione e di aderire a una realtà che la pone in svantaggio»³⁸. Le menzogne sembrano quasi dette solo per attrarre o per sedurre gli increduli astanti ed invece altro non sono, nella loro stravaganza, che l'unico modo concesso alla bambina per fuggire da una realtà troppo dolorosa.

³³ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 149.

³⁴ Sulla letteratura per l'infanzia contemporanea si vedano F. Bacchetti, F. Cambi, A. Nobile, F. Trequadrini (edd.), *Letteratura per l'infanzia oggi*, Bologna, Clueb, 2009; E. Beseghi, G. Grilli (edd.), *La letteratura invisibile. Infanzia e libri per bambini*, Roma, Carocci, 2011; M. Bernardi, *Letteratura per l'infanzia e alterità. Incanti, disincanti, ambiguità*, Milano, FrancoAngeli, 2016; L. Cantatore, S. Barsotti (edd.), *Letteratura per l'infanzia. Forme, temi e simboli del contemporaneo*, Roma, Carocci, 2019.

³⁵ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 216.

³⁶ H. Held, *L'immaginario al potere. Infanzia e letteratura fantastica*, Roma, Armando, 1978, p. 13.

³⁷ Il testo fu pubblicato per la prima volta nel 1945 ma la prima edizione italiana uscì ufficialmente nel 1958 nella collana «Il Martin Pescatore» di Vallecchi, grazie alla lungimiranza di Donatella Ziliotto che capì la forza eversiva dell'opera.

³⁸ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 152.

Ad ingaggiare una vera e proprio battaglia contro la bugia e la menzogna, soprattutto se dette con l'obiettivo di ingannare i più deboli, è invece soprattutto Gianni Rodari nel suo celebre romanzo *Gelsomino nel paese dei bugiardi* del 1958³⁹. Qui, il pirata Giacomone, stanco di viaggiare per mare, si stabilisce sulla terraferma e impone il proprio vocabolario e il proprio *modus operandi* menzognero a tutto il popolo, arrivando ad essere appellato «Sua Maestà», pena il taglio della lingua per chi si fosse rifiutato di riconoscerlo tale. In questo paese bizzarro, in cui la menzogna ha ormai preso il sopravvento sulla verità, giunge però all'improvviso la figura candida e sincera del bambino Gelsomino la cui lealtà mal si sposa con la rigidità degli abitanti succubi del pirata tiranno. Eppure, dopo non poche resistenze e dopo aver assistito da spettatore incredulo ad assurdità ed ingiustizie, sarà proprio Gelsomino ad assurgere al ruolo di vero protagonista del romanzo. Sarà la sua voce squillante e portentosa, in un primo momento guardata con sospetto se non addirittura con disprezzo da tutti, a «cantare il trionfo della verità, [...] quale primo passo verso la libertà»⁴⁰ demolendo così quel sistema di inganni e bugie costruito da re Giacomone che aveva privato il popolo della sua libertà.

La chiave ideologica alla base dell'opera rodariana è quanto mai evidente. L'impalcatura menzognera creata *ad hoc* dal re non può reggere la carica eversiva dell'urlo di Gelsomino, «capace di mettere a nudo le contraddizioni di un sistema di potere autoritario e di dimostrare che una comunicazione basata sull'imposizione è stupida e non può durare»⁴¹. Rodari, prima maestro, poi giornalista e scrittore per l'infanzia, uomo di solida formazione marxista e militante nelle file del P.C.I., proprio come il protagonista del suo romanzo, grida il suo “no” al potere che inganna, alla menzogna dei potenti. In una tale dimensione, in cui la realtà di un re imbrogliatore si contrappone all'innocenza e alla trasparenza di un bambino, la bugia assume senza dubbio una connotazione negativa, giacché risulta quale simbolo di repressione della libertà di espressione della più genuina verità.

Ecco dunque che, grazie a Rodari ma anche ad altri autori novecenteschi ben analizzati ed interpretati nel lavoro della Lepri, il bambino diventa una compatita vittima sacrificale della bugia degli adulti; ma a vincere, alla fine, in un percorso immaginario e quasi catartico che ci si augura possa compiere ogni società, sarà solo la “forza della verità” perché il bambino, da sempre

³⁹ *Gelsomino nel paese dei bugiardi* esce nel 1958 con le illustrazioni di Raul Verdini presso gli Editori Riuniti di Roma e ottiene nel giro di pochi anni numerose ristampe. Nella ricca bibliografia su Rodari si vedano in particolare i sempre validi M. Argilli, *Gianni Rodari. Una biografia*, Torino, Einaudi, 1990; F. Cambi, *Rodari pedagista*, Roma, Editori Riuniti, 1990; M. Argilli, L. Del Cornò, C. De Luca (edd.), *Le provocazioni della fantasia. Gianni Rodari scrittore e educatore*, Roma, Editori Riuniti, 1993, ma anche il più recente V. Roghi, *Lezione di Fantastica. Storia di Gianni Rodari*, Bari-Roma, Editori Laterza, 2020.

⁴⁰ Lepri, *Di bugia in bugia tra le pagine di narrativa per bambini e ragazzi*, cit., p. 167.

⁴¹ *Ibid.*, p. 168.

considerato “il mentitore per eccellenza”, ha dalla sua doti ormai smarrite dal mondo dei grandi, quali la spontaneità, l’innocenza e l’autenticità che ci portano a perdonare ogni “bugia bambina” ma soprattutto a dematerializzare e demitizzare ogni “realtà adulta”, in particolare quelle più ipocrite e menzognere.

La collana di classici della pedagogia «Educatori di ieri e di oggi»: un'ambiziosa (ma necessaria) scommessa sulla scuola e sugli insegnanti

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The series of classics of pedagogy «Educatori di ieri e di oggi»: an ambitious (but necessary) bet on schools and teachers

ABSTRACT: The contribution intends to present the genesis and birth of the new and prestigious series of classics of pedagogy «Educatori di ieri e di oggi», edited by Francesca Borruso, Lorenzo Cantatore, Carmela Covato and Donatello Santarone. It is a series of classics of pedagogy and education of undoubted interest and with an ambitious profile, not only for the scientific authority of its curators and the seriousness and competence of the scholars involved, but also for the precise cultural and pedagogical design which inspired the first classic prints.

EET/TEE KEYWORDS: Publishing; History of education; History of pedagogy; Italy; XIXth-XXth Centuries.

Introduzione

Risale ormai a due anni fa, ovvero alla metà del 2018, la nascita della collana «Educatori di ieri e di oggi», diretta per le *Edizioni Conoscenza* di Roma da Francesca Borruso, Lorenzo Cantatore, Carmela Covato e Donatello Santarone. Si tratta di una collana di classici della pedagogia e dell'educazione d'indubbio interesse e dal profilo ambizioso, non solamente per l'autorevolezza scientifica dei suoi curatori e la serietà e competenza degli studiosi coinvolti, ma anche per il preciso disegno culturale e pedagogico che ha ispirato i primi *classici* dati alle stampe nel suo ambito e per la cura, tanto filologica quanto storiografica, con cui i suddetti *classici* sono proposti all'attenzione del pubblico italiano; un

pubblico composto non solamente da specialisti e da ricercatori universitari, ma anche – e soprattutto – da educatori, dirigenti scolastici e insegnanti delle scuole di ogni ordine e grado.

Una collana di classici della pedagogia e dell'educazione che vede la luce in una stagione decisamente complicata, nella quale la scuola e gli insegnanti non sembrano suscitare un'effettiva attenzione e un reale interesse da parte della classe politica e – ancora peggio – non sembrano neppure godere del particolare favore dell'opinione pubblica. In una stagione, cioè, nella quale potrebbe apparire temerario, quando non addirittura una vera e propria perdita di tempo, scommettere sul rinnovamento della scuola e sulla promozione di una nuova cultura e professionalità degli insegnanti liberata finalmente dalla becera retorica della meritocrazia e dell'efficientismo di stampo neoliberista, nonché dalle illusioni e dalle storture di una riduzione della scuola e dei processi formativi a mero fattore della crescita economica e produttiva; e nutrita, per converso, di senso storico e di autentico respiro culturale.

Una collana di classici della pedagogia e dell'educazione che costituisce a tutti gli effetti un organismo vivo, un laboratorio d'idee, la cartina al tornasole che consente non soltanto di cogliere la cifra ideologica e culturale – oltre che pedagogica – del gruppo di studiosi che la promuove, ma anche di valutare la temperie culturale e politica, gli scenari educativi e scolastici di una determinata fase storica, le domande di senso e i più rilevanti bisogni formativi dei potenziali lettori (ricercatori universitari, studenti, educatori, insegnanti e uomini di scuola), ai quali i *classici* inseriti nella collana intendono fornire risposta.

Una collana di classici della pedagogia e dell'educazione, dunque, che non nasce dal nulla e nel nulla, come tante pseudo teorie efficientiste che negli ultimi due decenni hanno cercato di affermarsi nella scuola e nell'università italiane e di stravolgerne la natura e le caratteristiche di fondo, ma che si configura come l'erede di una lunga tradizione culturale e come il tentativo di recuperare e rilanciare un costume e un impegno militante della pedagogia italiana, la cui vicenda s'intreccia e si salda fortemente con la nascita e la secolare evoluzione dello Stato unitario e con la reiterata esigenza – destinata volta per volta a rivestire caratteristiche e modalità differenti – di promuovere l'identità nazionale e il sentimento della cittadinanza nelle popolazioni della penisola¹.

Sotto questo profilo, se vogliamo cogliere il reale significato del progetto e delle scelte di fondo che caratterizzano la collana «Educatori di ieri e di oggi», può essere utile mettere a confronto tale collana con i precedenti illustri che hanno punteggiato la storia pedagogica e culturale – ma anche scolastica ed educativa, come vedremo – dell'Italia unita.

¹ Si veda a questo riguardo lo splendido saggio recentemente pubblicato da G. Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, Bologna, il Mulino, 2019.

1. *I 'classici' della pedagogia e dell'educazione nella storia d'Italia: i molteplici volti e del «fare gli italiani»*

Potremmo cominciare col chiederci: quando comincia la 'smania' per i classici della pedagogia e dell'educazione? In Italia, sostanzialmente, prende avvio proprio all'indomani dell'unificazione nazionale. E la cosa è tutt'altro che casuale!

Basterebbe qui far cenno, ad esempio, ai «*Monumenta Italiae Paedagogica*», l'ambizioso progetto vagheggiato all'indomani dell'Unità da Domenico Romeo Taverni, dal 1882 professore straordinario di Pedagogia e Storia della filosofia nell'Università degli studi di Padova², sul quale ha richiamato recentemente l'attenzione un importante e documentato saggio critico di Juri Meda³, al quale si farà ampio riferimento nel corso di questa nota critica.

Il Taverni, com'è noto, auspicava la realizzazione di una monumentale collezione di testi destinati a raccogliere in edizione critica le fonti più significative relative alla tradizione pedagogica italiana; tradizione che egli riteneva necessario recuperare e porre al servizio degli insegnanti e degli educatori italiani:

Jacopo Moleschott, il grande fisiologo olandese – egli scriveva nella presentazione del suo progetto –, ha detto or ora al Senato italiano, che «i nostri insegnanti, massime i giovani, sanno, ma difettano dell'*arte pedagogica*, per insegnare quello che sanno». Mancano le *tradizioni pedagogiche*. Noi, insegnanti la dottrina educativa in questa augusta università di Padova, desideriamo, in servizio della patria, lavorare per riconoscere le *tradizioni* italiane dell'*arte pedagogica*. Specialmente per collocarle a fronte di quelle delle altre nazioni colte⁴.

Il modello e il principale punto di riferimento del Taverni era indubbiamente la celebre e sistematica raccolta di fonti per la storia della pedagogia e dell'educazione tedesche a partire dal Medioevo (comprendente regolamenti scolastici, libri di testo, trattati educativi etc.) intitolata «*Monumenta Germaniae Paedagogica*», che il pedagogista di scuola herbartiana Karl Kehrbach⁵, aveva iniziato a dare alle stampe all'inizio degli anni Ottanta dell'Ottocento⁶. Una collana di testi divenuta da subito un riferimento imprescindibile sul piano internazionale, nel cui ambito, già nel 1905, erano stati pubblicati ben 33

² Cfr. F. De Vivo, *Trent'anni di storia della scuola a Padova*, in F. Antinori (ed.), *Trent'anni di storia della scuola in Italia, 1965-1995*, Padova, CLEUP, 1998, pp. 14-15.

³ J. Meda, *I «Monumenta Italiae Paedagogica» e la costruzione del canone pedagogico nazionale (1886-1956)*, Milano, FrancoAngeli, 2019.

⁴ R. Taverni, *Monumenta Italiae Paedagogica*, Padova, Stabilimento Tipografico Prosperini, 1886, p. 8.

⁵ Cfr. W. Asmus, *Karl Kehrbach*, in *Neue Deutsche Biographie*, Berlin, Duncker & Humblot, 1977, Vol. 11, pp. 398-399.

⁶ Oltre alle ampie notizie riportate nel saggio di Juri Meda (pp. 16-22), si veda in particolare H. Bresslau (hrsg.), *Geschichte der Monumenta Germaniae historica*, Hahn, Hannover, 1921; H. Grundmann, *Monumenta Germaniae historica, 1819-1969*, München, Monumenta Germaniae Historica, 1969.

volumi, più della metà, dunque, dei complessivi 62 che avrebbero visto la luce entro il 1938.

Si poneva, per il Taverni, l'impellente necessità di definire il «canone pedagogico nazionale», scavando nelle opere e negli scritti dei tanti pensatori italiani che dal Medioevo e dal Rinascimento fino al Risorgimento si erano occupati di cose educative. All'indomani del compimento dell'unificazione nazionale, cioè, era opportuno precisare quale fosse il complesso delle opere educative alle quali la comunità pedagogica italiana riconosceva un valore esemplare, ritenendole pertanto degne di essere trasmesse e conosciute.

Più in particolare, era necessario selezionare un *corpus* di opere pedagogiche destinato a formare, secondo principi e modelli precisi, gli educatori nazionali e gli insegnanti delle scuole italiane di ogni ordine e grado. A detta del Taverni, infatti,

il recupero di quella ricca produzione, in larga parte dispersa e sconosciuta, era in effetti fondamentale al fine di consolidare negli insegnanti la consapevolezza d'una tradizione educativa propriamente italiana e contribuire – attraverso essa – alla costruzione d'una solida identità nazionale, trasmettendo alle nuove generazioni i valori etico-civili e i principi fondanti la ritrovata unità⁷.

I *classici* della pedagogia e dell'educazione, dunque, come fondamento ideologico e culturale dei processi di *Nation building*: era questo, nella sostanza, il cuore dell'ambizioso progetto del docente padovano⁸.

In realtà, questo primo, generoso tentativo del Taverni, che accumulò ingenti materiali bibliografici e dedicò ampi studi alla determinazione del «canone pedagogico nazionale», era destinato a fallire, soprattutto in ragione della mancanza di un effettivo sostegno da parte della classe dirigente liberale, della Sinistra storica di Depretis prima e di quella crispina più tardi.

Di lì a poco tuttavia, nel 1896, prese avvio una complessa operazione editoriale, che mirava ad offrire «una prima panoramica della grande tradizione pedagogica nazionale». Intendiamo riferirci alla raccolta delle opere degli scrittori pedagogici italiani dal XV al XIX secolo curata da Giovanni Battista Gerini⁹, il quale avrebbe impiegato quasi quindici anni a realizzare l'impresa di recuperare e mettere a disposizione di un pubblico anche di non specialisti i

⁷ Meda, I «*Monumenta Italiae Paedagogica*» e la costruzione del canone pedagogico nazionale (1886-1956), cit., p. 36.

⁸ Cfr. G. Chiosso, I *classici della pedagogia tra positivismo e riforma Gentile*, in G. Cives, G. Genovesi, P. Russo (edd.), I *classici della pedagogia. Atti del seminario del CIRSE (Cassino, 3-4 dicembre 1997)*, Milano, FrancoAngeli, 1999, pp. 33-52.

⁹ Meda, I «*Monumenta Italiae Paedagogica*» e la costruzione del canone pedagogico nazionale (1886-1956), cit., pp. 38-40. Sul Gerini si veda ora la voce di R. Pellerrey, *Giovanni Battista Gerini*, in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione*, 2 voll., Milano, Editrice Bibliografica, 2014, Vol. I, p. 636.

principali e più importanti trattati di pedagogia e di educazione editi a partire dall'età umanistica e rinascimentale.

I primi due volumi della raccolta, infatti, videro la luce tra il 1896 e il 1897 nella «Collezione di libri d'istruzione e d'educazione», la principale collana di manuali scolastici di Paravia, mentre i successivi tre uscirono tra il 1900 e il 1910 nella più prestigiosa collana «Biblioteca di filosofia e pedagogia» della stessa casa editrice torinese¹⁰.

L'opera del Gerini si componeva di monografie scientifiche contenenti minuziose esposizioni delle teorie pedagogiche d'una ampia schiera di autori. «Essi costituivano una sorta di *digest* della trattatistica pedagogica italiana, ordinata su base cronologica, in cui la biografia dell'autore di volta in volta trattato era seguita da una sintetica analisi del suo pensiero pedagogico, ripartito per tematiche generali, così da facilitare il reperimento delle nozioni e dei concetti»¹¹.

Non si trattava, nel complesso, di una grande opera; e nemmeno di una vera e propria presentazione dei 'classici' della tradizione pedagogica italiana in edizione critica. Piuttosto, siamo di fronte ad una prima – ancorché parziale e non priva di evidenti limiti – individuazione di autori e opere destinati a costituire il «canone pedagogico nazionale». Fino alla comparsa della compendiosa raccolta de *Gli scrittori pedagogici italiani* del Gerini, infatti, non si disponeva ancora d'un censimento sistematico dei pensatori della penisola che avevano dedicato *in toto* o in parte le proprie riflessioni alle tematiche pedagogiche ed educative.

Ma qual è la cifra ideologica – e pedagogica – del progetto portato avanti, tra il 1896 e il 1910 dallo studioso torinese? Il costante riferimento alla *tradizione pedagogica nazionale* «inseriva a pieno titolo la raccolta delle opere degli scrittori pedagogici italiani del Gerini nel solco dello spiritualismo cattolico tardo-ottocentesco, impegnato in quegli stessi anni in un'accesa controversia con l'ormai fiorente positivismo pedagogico, latore delle istanze della pedagogia scientifica di matrice tedesca»¹², al quale contrapponeva una prospettiva pedagogica saldamente ancorata ai principi cristiani e fedele allo spirito e agli indirizzi della tradizione pedagogica nazionale.

Sotto questo profilo, la pubblicazione dei testi pedagogici ed educativi elaborati nel nostro paese tra Umanesimo e Risorgimento costituiva per Gerini un esercizio epistemologico finalizzato alla definizione del principio informatore della pedagogia italiana, ovvero del «canone pedagogico nazionale».

¹⁰ G.B. Gerini, *Gli scrittori pedagogici italiani del secolo decimoquinto*, Torino, Paravia, 1896; Id., *Gli scrittori pedagogici italiani del secolo decimosesto*, idem, 1897; Id., *Gli scrittori pedagogici italiani del secolo decimosettimo*, idem, 1900; Id., *Gli scrittori pedagogici italiani del secolo decimoottavo*, id., 1901; Id., *Gli scrittori pedagogici italiani del secolo decimonono*, idem, 1910.

¹¹ Meda, I «*Monumenta Italiae Paedagogica*» e la costruzione del canone pedagogico nazionale (1886-1956), cit., p. 39.

¹² *Ibid.*, p. 45.

Con l'avvento del nuovo secolo, Luigi Credaro (1860-1939), allievo di Carlo Cantoni all'Università di Pavia, uno dei maggiori esponenti del neo-herbartismo pedagogico italiano¹³, rilanciava, sulle pagine della autorevole «Rivista Pedagogica», da lui stesso fondata e diretta, l'idea dei «Monumenta Italiae Paedagogica»¹⁴.

Pedagogista e uomo di scuola tra i più impegnati e prestigiosi del suo tempo, Credaro fu il promotore e primo presidente dell'Unione Magistrale Nazionale (1901)¹⁵, fu anche ministro della Pubblica Istruzione in età giolittiana e coautore della Legge Daneo-Credaro sull'avocazione delle scuole elementari allo Stato (1911)¹⁶.

Credaro sottolineava le ragioni fondamentali per cui era necessario realizzare anche nel nostro paese una vasta edizione critica dei classici della pedagogia sul modello tedesco. In primo luogo, in quanto gli umanisti italiani del Rinascimento erano stati i primi maestri intesi in senso moderno e avevano contribuito a diffondere gli studi classici in tutta Europa, motivo per cui i «Monumenta» avrebbero gettato «nuova luce sul nascimento delle istituzioni scolastiche moderne» e sarebbero serviti «di base a una storia della formazione del carattere e dello spirito italiano».

E ancora, aggiungeva Credaro:

Ma il valore più alto di una simile raccolta di classici della pedagogia è che essa estenderà al campo pedagogico l'applicazione del metodo induttivo, che da Galileo e da Bacone fu fecondo di grandiosi risultati per le scienze della natura, e che da qualche tempo vengono tentando anche le scienze sociali. Non abbandonandoci a una vecchia e nuova metafisica dello spirito, ma prendendo a fondamento l'esperienza stessa¹⁷.

Il neo-herbartismo pedagogico, in sostanza, si proponeva di fondare la pedagogia come disciplina scientifica, autonoma rispetto alla filosofia, la quale avrebbe dovuto avere come fine lo studio dei fondamenti teorici, delle metodologie didattiche e delle pratiche formative, al fine di qualificarsi come il principale strumento per la formazione degli insegnanti e per la determinazione dei fini, dei metodi e delle pratiche della scuola.

¹³ M.A. D'Arcangeli, *L'impegno necessario: filosofia, politica, educazione in Luigi Credaro (1860-1914)*, Roma, Anicia, 2004; e A. Barausse, *I maestri all'università. La Scuola pedagogica di Roma (1904-1923)*, Perugia, Morlacchi, 2005.

¹⁴ M.A. D'Arcangeli, *Verso una scienza dell'educazione. La «Rivista pedagogica» (1908-1939)*, Roma, Anicia, 2012.

¹⁵ A. Barausse, *L'Unione Magistrale Nazionale. Dalle origini al fascismo (1901-1925)*, Brescia, La Scuola, 2002.

¹⁶ N. Credaro Porta, A. Colombo (edd.), *Luigi Credaro il coraggio dell'impegno: atti del Convegno (Sondrio, 16 ottobre 1999)*, Sondrio, Istituto sondriese per la storia del movimento di liberazione, 2001, pp. 61-97.

¹⁷ L. Credaro, *L'opera della «Società per la Storia dell'educazione e della scuola tedesca»*, «Rivista filosofica», vol. XIV, n. 6, 1899, pp. 217-238.

La mancata realizzazione, in epoca giolittiana, del progetto credariano di rinnovamento della cultura educativa e scolastica attraverso il recupero della grande tradizione pedagogica nazionale appare strettamente collegato al maturare in Italia, ben prima dell'avvento del fascismo, dell'egemonia filosofica – e pedagogica – neoidealista di matrice gentiliana¹⁸.

Com'è stato giustamente sottolineato, fin dal novembre del 1900 Giovanni Gentile aveva manifestato la sua netta contrarietà nei riguardi non solamente dell'ormai declinante cultura pedagogica di matrice positivista, ma anche nei confronti del neo-herbartismo di stampo credariano, sottolineando, in un'importante relazione presentata all'Accademia dei Lincei, che la pedagogia coincideva con la scienza dello spirito e si risolveva pertanto nella filosofia¹⁹.

Il filosofo di Castelvetro, com'è noto, sarebbe poi tornato nuovamente su questo tema nel 1913, con la pubblicazione del suo fondamentale saggio *Pedagogia come scienza filosofica*, nel quale contestava duramente la concezione neo-herbartiana della pedagogia come scienza autonoma dalla filosofia²⁰.

In questo scenario va inquadrata la creazione, presso la casa editrice palermitana Remo Sandron²¹, ad opera di Giuseppe Lombardo Radice²², che la diresse dal 1910 al 1939, della celebre collana «Pedagogisti ed educatori antichi e moderni», la quale puntava a riproporre in chiave critica l'opera dei maggiori pedagogisti ed educatori antichi e moderni, inclusi quei poeti e filosofi che avevano contribuito a «formare una migliore coscienza pedagogica nazionale»²³.

Nel presentare le finalità e il piano editoriale della nuova collana sulle pagine dei «Nuovi Doveri», il pedagogista siciliano sottolineava:

La maggior parte dei volumi sarà di accurate traduzioni o ristampe di intere opere classiche intorno all'educazione. Si darà largo posto alla produzione di insigni autori, comunemente non classificati fra i pedagogisti, ma che han lasciato profonde tracce nel campo educativo:

¹⁸ Cfr. Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, cit., pp. 63-151.

¹⁹ G. Gentile, *Del concetto scientifico della pedagogia*, «Rendiconti della R. Accademia dei Lincei. Classe di scienze morali, storiche e filologiche», vol. IX, n. 11, 1900, pp. 637-671. Sulle polemiche seguite a tale presa di posizione, si veda Meda, *I «Monumenta Italiae Paedagogica» e la costruzione del canone pedagogico nazionale (1886-1956)*, cit., p. 81.

²⁰ G. Gentile, *Pedagogia come scienza filosofica. 1: Sommario di pedagogia generale*, Bari, Laterza, 1913; Id., *Pedagogia come scienza filosofica. 2: Sommario di didattica*, Bari, Laterza, 1914.

²¹ Sull'editore palermitano Remo Sandron e sulla sua collaborazione con Giuseppe Lombardo Radice, si veda ora: R. Sani, *Editori per la scuola e libri di testo in Sicilia tra Otto e Novecento: il caso Sandron (1839-1925)*, in Id., *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, pp. 107-158.

²² Su Giuseppe Lombardo Radice si veda G. Cives, *Attivismo e antifascismo in Giuseppe Lombardo Radice: critica didattica o didattica critica?*, Firenze, La Nuova Italia, Firenze, 1983.

²³ Si veda la presentazione della collana in «Nuovi Doveri», vol. IV, nn. 73-74, 1910 (pagine non numerate).

poeti, storici, filosofi, agitatori. Ogni volume sarà preceduto da una introduzione illustrativa e seguito da una scelta bibliografia. Scopo della raccolta è di mettere in circolazione un buon numero di libri adatti a formare una migliore coscienza pedagogica nazionale, fornendo ai giovani alti esempi ed ispirazioni per l'opera di rinnovamento sociale che essi son destinati a promuovere e agli insegnanti gli strumenti per contrastare il particolarismo e la microcefalia degli specialisti, i quali hanno abbassato di tanto il valore della educazione scolastica nazionale.

Come si vede, nel programma delineato da Giuseppe Lombardo-Radice mancava qualsiasi riferimento esplicito alla tradizione pedagogica nazionale, la cui centralità, viceversa, era stata a più riprese sottolineata dai precedenti progetti di orientamento spiritualista e positivista, come del resto da quello di matrice neo-herbartiana. A riprova dell'approccio del tutto eccentrico rispetto a quelli precedenti che animava Lombardo Radice, basterebbe scorrere l'elenco degli autori e delle opere che avrebbero dovuto comparire nella collana «Pedagogisti ed educatori antichi e moderni» dell'editore Sandron. Con riferimento alle sole età moderna e contemporanea, ad esempio, figuravano: Erasmo da Rotterdam, Martin Lutero, Giovanni Sturm, Ludovico Vives, Montaigne, Milton, Comenius, Leibniz, Francke e i Pietisti, Locke, Rousseau, Condorcet, Basedow, Herder, Humboldt, Pestalozzi, Froebel, Goethe e Schiller, Schleiermacher, Kant, Fichte, Schelling, Herbart, e i moderni pedagogisti inglesi ed americani.

Il neoidealismo italiano, come si vede, rinunciava alla centralità della tradizione pedagogica nazionale per promuovere una cultura pedagogica di stampo marcatamente filosofico e d'intonazione decisamente sovranazionale, allo scopo di offrire «ai giovani alti esempi ed ispirazioni per l'opera di rinnovamento sociale che essi sono destinati a promuovere»²⁴. Sotto questo profilo, lo ha giustamente notato Juri Meda, la collana diretta da Lombardo Radice «programmava insomma di dedicare agli autori squisitamente italiani solo otto volumi su cinquantadue (corrispondente circa al 15%), a conferma del declino della pregiudiziale nazionale che aveva contraddistinto la produzione storiografica della scuola storico-pedagogica positivista e della rinuncia alla ricerca di quel 'canone pedagogico nazionale' che ne aveva costituito un elemento caratterizzante»²⁵.

La collana «Pedagogisti ed educatori antichi e moderni» diretta tra il 1910 e il 1939 da Giuseppe Lombardo Radice per l'editore Remo Sandron era destinata, com'è noto, ad avere un'enorme diffusione fra gli insegnanti e nella scuola italiana²⁶. Non c'è dubbio, tuttavia, sul fatto che il progetto culturale ad

²⁴ *Ibid.*

²⁵ Meda, *I «Monumenta Italiae Paedagogica» e la costruzione del canone pedagogico nazionale (1886-1956)*, cit., p. 86.

²⁶ Cfr. Sani, *Editori per la scuola e libri di testo in Sicilia tra Otto e Novecento: il caso Sandron (1839-1925)*, cit., pp. 153-156.

essa sotteso si allontanava notevolmente da quello che aveva animato, a cavallo tra l'Otto e il Novecento, la cultura pedagogica nazionale.

Il rilancio in grande stile dell'antico disegno vagheggiato da Domenico Romeo Taverni di realizzare in Italia qualcosa di analogo ai «*Monumenta Germaniae Paedagogica*» del Kehrbach sarebbe stato operato, nella seconda metà degli anni Trenta, dal pedagogista Giovanni Calò, allievo del filosofo Francesco De Sarlo e, in seguito, attivo collaboratore di Luigi Credaro e della sua «*Rivista Pedagogica*», esponente di primo piano di quel 'realismo pedagogico' che tanta parte doveva avere nell'animazione, tra le due guerre, del cosiddetto fronte anti-idealista²⁷.

Avviato dal Calò nel dicembre del 1940 sotto la direzione della Reale Accademia d'Italia e con il fondamentale contributo del Ministero dell'Educazione Nazionale, il progetto dei «*Monumenta Italiae Paedagogica*» aveva come duplice obiettivo quello di contrastare l'egemonia del neo-idealismo gentiliano sul fronte filosofico e pedagogico e, al contempo, quello promuovere un originale connubio tra il realismo filosofico (Francesco De Sarlo) e la filosofia – e pedagogia – spiritualista di matrice cattolica.

Non è un caso che Calò, nell'indicare gli scrittori e le correnti che avrebbero dovuto figurare nei «*Monumenta Italiae Paedagogica*» puntasse a recuperare i testi e gli autori direttamente riferibili alla tradizione pedagogica ed educativa confessionale, dal medioevo all'età della controriforma e su su fino all'Ottocento:

Scolastici (De magistro di San Tommaso, Pietro Lombardo, sant'Anselmo, san Bonaventura ecc.)
I pedagogisti mistici del periodo umanistico (Frate Giovanni Dominici, san Bernardino da Siena, sant'Antonino da Firenze, Savonarola, ecc.). *Scrittori della Controriforma e del '600* (il card. Silvio Antoniano, il gesuita Antonio Possevino ecc.).

E ancora:

Costituzioni della Compagnia di Gesù e loro *Ratio et institutio studiorum*; San Girolamo Emiliani e i Somaschi, san Gaetano da Thiene e i Teatini, sant'Angela Merici e le Orsoline; San Filippo Neri e l'Oratorio, san Carlo Borromeo; San Giuseppe Calasanzio e gli Scolopi; Sant'Antonio Maria Zaccaria e i Barnabiti; *I Fratelli delle Scuole Cristiane* in Italia (J.B. de La Salle); Antonio Rosmini e i Fratelli della Carità; Don Giovanni Bosco e i Salesiani²⁸.

Come ha ricordato giustamente Juri Meda:

In definitiva, nel suo progetto, Calò recuperava la centralità delle pedagogie umanistica e risorgimentale nella definizione del canone pedagogico nazionale, già sostenuta da Credaro,

²⁷ Cfr. G. Chiosso, *Giovanni Calò e il realismo pedagogico negli anni Venti e Trenta* (1923-1936), «*Pedagogia e Vita*», vol. 4, 1984-85, pp. 411-434; e ora anche E. Scaglia, *Giovanni Calò nella pedagogia italiana del Novecento*, Brescia, La Scuola, 2013.

²⁸ G. Calò, *Su un piano di pubblicazione dei «Monumenta Italiae Paedagogica»*, «*Atti della Reale Accademia d'Italia. Rendiconti della Classe delle scienze morali e storiche*», serie 7, vol. 2, n. 12, maggio 1941, pp. 443-448.

senza però negare – sotto l’influsso dello spiritualismo cattolico tardo-ottocentesco – il profondo ascendente su di esso esercitato anche dalla pedagogia cristiana fin dal periodo medievale. Colui che si profilava sempre più come il «Kehrbach italiano» auspicato a suo tempo da Credaro prevedeva di stampare «in complesso, oltre sessanta forti volumi in-ottavo», molti dei quali dedicati a figure, eventi e questioni quasi completamente inedite o comunque non ancora sistematicamente approfondite da alcun studioso²⁹.

Nei mesi seguenti, con l’approvazione dell’accordo per l’«edizione nazionale» dei «*Monumenta Italiae Paedagogica*», con il finanziamento *in toto* dell’operazione da parte dello Stato e, infine, con la stipula del contratto commerciale con la casa editrice CEDAM per la stampa e la diffusione dei relativi volumi, sembrò davvero che il progetto propugnato da Giovanni Calò potesse realizzarsi.

In realtà, la forzata interruzione e il successivo definitivo abbandono dell’iniziativa a causa della guerra e poi della caduta del fascismo erano destinati a vanificare nuovamente la realizzazione di un’impresa analoga a quella dei «*Monumenta Germaniae Paedagogica*» del Kehrbach.

Nel secondo dopoguerra, com’è noto, abbandonata definitivamente l’ipotesi di un recupero della tradizione pedagogica nazionale, il proposito di un rilancio dei classici della pedagogia e dell’educazione ai fini dell’innalzamento qualitativo della formazione iniziale e dell’aggiornamento in servizio degli insegnanti, come pure della crescita della sensibilità educativa nella società italiana era destinato ad assumere molteplici caratterizzazioni e sfaccettature.

Innanzitutto, la già ricordata collana «*Educatori Antichi e Moderni*» fondata e diretta da Giuseppe Lombardo Radice per i tipi dell’editore palermitano Sandron sarebbe stata trasferita nel 1949 presso la casa editrice La Nuova Italia di Firenze e, sotto la direzione di Ernesto Codignola e Lamberto Borghi, avrebbe conosciuto una nuova e straordinaria stagione, dando voce ad una tradizione culturale d’ispirazione laica terzaforzista che guardava alle grandi espressioni teoriche internazionali della pedagogia attivistica di orientamento democratico (Dewey, Ferrière etc.) e alle esperienze delle «scuole nuove» avviate in tutto il mondo³⁰.

Accanto ad essa, si collocava la collana «*I classici della pedagogia italiana*», diretta tra il 1956 e il 1963 da Ernesto Lama e Luigi Volpicelli per le edizioni Giuntine e Sansoni di Firenze. Espressione di una tradizione culturale e pedagogica di matrice liberale moderata, questa collana punterà nel secondo dopoguerra a rilanciare il progetto credariano di un recupero e una valorizzazione dei classici della pedagogia italiana³¹.

²⁹ Meda, *I «Monumenta Italiae Paedagogica» e la costruzione del canone pedagogico nazionale (1886-1956)*, cit., p. 160.

³⁰ Cfr. F. Cambi, *La scuola di Firenze: da Codignola a Laporta 1950-1975*, Napoli, Liguori, 1982.

³¹ Cfr. E. Zizioli, *Luigi Volpicelli. Un idealista fuori dalle formule*, Roma, Anicia, 2009.

Assai significative, a cavallo tra gli anni Cinquanta e gli anni Ottanta, sarebbero state le collane di classici della pedagogia e dell'educazione promosse dall'Editrice La Scuola di Brescia³², vera e propria roccaforte della tradizione pedagogica cattolica di matrice spiritualista, neo-tomista e personalista³³, e dagli Editori Riuniti, la casa editrice romana vicina al PCI, particolarmente attenta ai temi dell'educazione e della scuola e alla diffusione tra gli insegnanti della cultura e della pedagogia marxista³⁴.

Per quel che concerne l'editrice La Scuola di Brescia, basterebbe qui far riferimento alla collana «Il pensiero cristiano» (1949), diretta da Michele Federico Sciacca, e all'altra, ancora più significativa, apparsa lo stesso anno con il titolo «Classici della pedagogia commentati» (1949), diretta da Mario Casotti, nell'ambito delle quali videro la luce, fino alla fine degli anni Settanta, opera di filosofi dell'educazione e di pedagogisti ed educatori cristiani dal medioevo all'età contemporanea³⁵.

Per i tipi degli Editori Riuniti, com'è noto, al principio degli anni Settanta vedeva la luce la collana «Paideia», diretta da Alberto Alberti, nell'ambito della quale videro la luce, nel corso del decennio, circa una settantina di volumi. Pur essendo una collana di tipo generalista, non limitata dunque ai classici della pedagogia e dell'educazione, ma aperta a opere di varia natura (trattati di teoria pedagogica e di metodologia didattica, saggi di storia della pedagogia, della didattica e della scuola, manuali per insegnanti etc.), «Paideia» accolse una nutrita serie di classici (Makarenko, Freinet, Wygotskij, Wallon etc.), curati da studiosi di prestigio³⁶.

Un capitolo a parte, infine, è quello rappresentato dall'editore romano Armando Armando, specializzato in pubblicazioni di carattere pedagogico e didattico e in testi per la scuola e per gli insegnanti³⁷. Formatosi alla scuola di Giuseppe Lombardo Radice, con il quale si era laureato in pedagogia all'Università di Roma, e legatosi nel tempo a pedagogisti di diverso orientamento ideale (Luigi Volpicelli, Salvatore Valitutti, Giovanni Gozzer, Fabrizio Ravaglioli e Mauro Laeng), a partire soprattutto dagli anni Settanta, Armando Armando diede vita ad una serie di collane di classici della pedagogia

³² Cfr. R. Sani, «*Scuola Italiana Moderna*» e il problema dell'educazione popolare negli anni del secondo dopoguerra (1945-1962), in M. Cattaneo, L. Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna» 1893-1993*, Brescia, La Scuola, 1997, pp. 265-319.

³³ Cfr. R. Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra 1944-1958*, Brescia, La Scuola, 1990, pp. 89-97.

³⁴ Cfr. F. Pruneri, *La politica scolastica del Partito comunista italiano dalle origini al 1955*, Brescia, La Scuola, 1999.

³⁵ Cfr. D. Gabusi, *Le collane storiche (1904-1954)*, in L. Pazzaglia (ed.), *Editrice La Scuola 1904-2004. Catalogo storico*, Brescia, La Scuola, 2004, pp. 179-190.

³⁶ Le informazioni rese nel testo mi sono state cortesemente fornite dall'amica e collega Carmela Covato dell'Università degli Studi di Roma Tre, che qui ringrazio per la cortese disponibilità.

³⁷ Cfr. C.I. Salviati, *Una battaglia per la scuola. Armando Armando e il Bollettino «Servizio Informazioni AVIO»*, Roma, Nuove Edizioni Romane, 2009.

e dell'educazione dalla caratterizzazione epistemologica fortemente innovativa, non solo per la convinta e massiccia apertura ad opere e ad autori stranieri, ma anche, e soprattutto, per una concezione plurale delle scienze dell'educazione, comprensiva non solamente dei saperi pedagogici e didattici tradizionali, ma anche di discipline quali la psicologia dello sviluppo e dell'educazione, la sociologia dell'educazione, l'antropologia culturale, la neuropsichiatria infantile etc.³⁸

Basterebbe qui far cenno al ruolo esercitato dalla prima delle diverse collane cui diede vita Armando, «I problemi della pedagogia», diretta da Luigi Volpicelli, la quale accolse diverse centinaia di titoli e contribuì a far conoscere in Italia l'opera di Hessen, Kaminski, Friedman, Bruner, Spranger, Litt, Boyd, Hubert, Blättner, Richmond, Bloom, Dottrens etc.; dando spazio, altresì, ad autori di ambiti scientifici diversi da quello strettamente pedagogico, ma sensibili e attenti ai temi dell'educazione e della scuola, come ad esempio Howard Gardner, Erik Erikson, Donald Winnicott, Giovanni Bollea, Renzo Titone e altri ancora³⁹.

Fin qui il quadro delle principali collane di classici della pedagogia e dell'educazione che hanno caratterizzato la vicenda dell'Italia unita fino ai giorni nostri.

2. «Educatori di ieri e di oggi»: una scommessa sulla qualità della professionalità docente e sul futuro dell'educazione e della scuola

È alla luce di questo quadro che è possibile cogliere mutamenti e persistenze, rispetto alle autorevoli esperienze sopra ricordate, della collana «Educatori di ieri e di oggi» che qui presentiamo.

A distanza di due anni dal suo esordio, la collana delle Edizioni Conoscenza di Roma presenta una manciata di titoli – solo sette in totale – ma già sufficienti per cogliere qual è l'idea di *classici* della pedagogia e dell'educazione che ispira i curatori e a quali istanze ed esigenze pedagogiche e culturali del nostro tempo tale collana intende dare risposta.

È il caso, ad esempio, dei primi due contributi, il celebre saggio *Scuola e società* di John Dewey, introdotto e curato da Francesca Borruso⁴⁰, e l'altrettanto celebre *Quaderno n. 12* («Appunti e note sparse per un gruppo di saggi sulla storia degli intellettuali») di Antonio Gramsci, presentato e curato da Chiara Meta⁴¹.

³⁸ Cfr. E. Zizioli, *Armando Armando. Un pedagogista editore*, Roma, Anicia, 2011.

³⁹ Cfr. L. Pomante, R. Sani, *Armando Armando*, in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione*, cit., Vol. I, pp. 63-64.

⁴⁰ J. Dewey, *Scuola e società*, introduzione e cura di F. Borruso, Roma, Edizioni Conoscenza, 2018.

⁴¹ A. Gramsci, *Quaderno del carcere n. 12*, introduzione e cura di C. Meta, Roma, Edizioni

Riproposto nella bella versione approntata nel 1949 da Lamberto Borghi e Ernesto Codignola, comprensiva della *Prefazione* di quest'ultimo, *Scuola e società* (1899) di John Dewey ha esercitato, come giustamente sottolinea Francesca Borruso, «una influenza costante, evidente ancora oggi, nella scuola e nella pedagogia italiane». In essa, lo studioso americano introduce gran parte delle sue più importanti tematiche pedagogiche, anticipando grossi nuclei argomentativi che, in seguito, continuerà a sviluppare e ad approfondire nel corso della sua lunga biografia intellettuale»⁴².

Basterebbe qui far cenno, per limitarci ai temi essenziali della riflessione deweyana, allo stretto rapporto che intercorre fra la scuola e la società, come anche al ruolo che l'educazione è chiamata ad esercitare quale perno essenziale del progresso sociale e dello sviluppo di società democratiche. Ma *Scuola e società* contiene molto di più: in essa Dewey delinea i fondamenti psico-pedagogici dell'educazione attiva, alla luce della quale l'autore disegna «una scuola profondamente diversa da quella tradizionale»; una sorta di scuola-laboratorio che vede l'alunno protagonista del proprio apprendimento.

La stringente attualità del pensiero del filosofo e pedagogista americano e dei temi affrontati in *Scuola e società* è efficacemente richiamata da Francesca Borruso, laddove la studiosa sottolinea come

la scuola autenticamente democratica immaginata da Dewey non si sia ancora del tutto realizzata, visto che il sistema scolastico, ancora oggi, è affetto dai temi della selezione di classe, da una irrisolta dinamica del rapporto fra la teoria e la prassi, dall'evasione scolastica, dall'assenza di forme di promozione sociale, da un difficile rapporto con il mondo del lavoro, dall'inasprirsi di nuove forme di gerarchia al suo interno⁴³.

Gli «Appunti e note sparse per un gruppo di saggi sulla storia degli intellettuali» raccolti nel *Quaderno del carcere n. 12* di Gramsci offrono l'occasione a Chiara Meta per offrire al lettore un ampio e stimolante affresco non solamente dello straordinario lascito intellettuale e politico del pensatore sardo, ma anche della sua originale e significativa riflessione 'pedagogica' ed educativa, la quale presenta ancora oggi spunti e motivi di grande attualità. Una riflessione condotta in presa diretta con la realtà e incentrata sui temi della formazione delle masse, dell'educazione della coscienza critica, del rinnovamento dell'istruzione e della scuola, dell'approfondimento, infine, della questione dell'egemonia e del fondamentale ruolo di mediazione esercitato dagli intellettuali nella società di massa⁴⁴.

Il compito che Gramsci affida alla scuola, sottolinea giustamente Chiara Meta illustrando i molteplici temi approfonditi nel testo, in particolare quando

Conoscenza, 2018.

⁴² Dewey, *Scuola e società*, introduzione e cura di F. Borruso, cit., p. 9.

⁴³ *Ibid.*, p. 26.

⁴⁴ Cfr. Gramsci, *Quaderno del carcere n. 12*, introduzione e cura di C. Meta, cit., pp. 23-25.

Gramsci parla di «ricerca del principio educativo», è quello di «promuovere un modello educativo atto a sviluppare e allargare le capacità di comprensione umana». Un motivo di grande attualità, così com'è di grande attualità la proposta di «una scuola che non ipotechì l'avvenire del fanciullo e costringa la sua volontà, la sua intelligenza, la sua coscienza in formazione a muoversi entro un binario a stazione prefissata»:

Al contrario – precisa Chiara Meta – Gramsci pensa a «una scuola 'attiva' e 'creativa', rivolta a tutti e capace di sviluppare, in modo completo, le facoltà dell'essere umano. Cosicché solo dalla critica e dalla riforma del senso comune diffuso, a suo avviso, potrà scaturire una nuova visione della cultura intesa come strumento di emancipazione dalla subalternità e come patrimonio universalmente condiviso⁴⁵.

Questi due primi contributi editi nell'ambito della collana «Educatori di ieri e di oggi» delle Edizioni Conoscenza di Roma testimoniano, ad avviso di chi scrive, il tentativo di elaborare un nuovo «canone pedagogico» per la formazione degli insegnanti e per il rinnovamento della scuola, capace di recuperare e rilanciare la tradizione liberale-democratica americana (John Dewey) e quella del marxismo critico (Antonio Gramsci), che furono a lungo contrapposte, com'è noto, negli anni del secondo dopoguerra⁴⁶.

Sulla stessa linea, ma con una forte carica innovativa, si colloca il terzo volume edito nella collana, ovvero la raccolta di articoli e saggi di Dina Bertoni Jovine dedicati al tema de *L'educazione democratica*, ottimamente introdotta e curata da Edoardo Puglielli⁴⁷.

Giustamente collocata tra i nuovi 'classici' della pedagogia e della didattica, l'opera della studiosa comunista comprende, oltre alle importanti monografie e ai diversi volumi da lei curati, un notevole numero di articoli e interventi apparsi, tra gli anni Cinquanta e Settanta, su riviste scolastiche e pedagogiche di grande prestigio, da «Riforma della scuola» a «Educazione democratica», da «Scuola e città» a «Belfagor», da «I diritti della scuola» a «I problemi della pedagogia», fino a «Cultura e scuola» e, su un versante di carattere più politico e culturale in senso lato, a «Rinascita» e a «Critica marxista».

Una produzione vasta e d'indubbio spessore critico, espressione dell'impegno d'intellettuale militante che ha sempre caratterizzato Dina Bertoni Jovine; ma anche una produzione che, sovente in risposta a questioni ed esigenze sorte

⁴⁵ *Ibid.*, pp. 35-36 e 40.

⁴⁶ Cfr. l'eccellente e documentata ricostruzione del conflitto proposta da C. Covato, *Democrazia ed educazione. Il confronto fra marxisti e attivisti negli anni Sessanta*, in M. Fiorucci, G. Lopez (edd.), *John Dewey e la pedagogia democratica del '900*, Roma, Roma Tre Press, 2017, pp. 101-108. Si veda anche D. Ragazzini, *Dall'educazione democratica alla riforma della scuola. Per una storia dell'identità della pedagogia e del dibattito sul posto dell'educazione nella teoria e nella pratica della trasformazione sociale*, Napoli, Liguori, 1987.

⁴⁷ D. Bertoni Jovine, *L'educazione democratica. Scritti scelti di pedagogia e didattica*, introduzione e cura di E. Puglielli, Roma, Edizioni Conoscenza, 2019.

dal basso e dal vivo dell'esperienza quotidiana della scuola e degli insegnanti, è stata capace di offrire spunti significativi e di additare soluzioni originali ai problemi della vita scolastica e della pratica didattica nell'Italia del secondo dopoguerra.

Tra i molteplici testi pubblicati su rivista dalla studiosa, Puglielli ha selezionato quelli che attengono ad un tema di grande valore e attualità, quello dell'educazione democratica: vera e propria emergenza negli anni in cui Dina Bertoni Jovine scriveva e – ahimè – autentica e misconosciuta emergenza anche ai nostri giorni.

Il quadro che ne viene fuori è quello di un contributo straordinariamente lucido alla soluzione di una questione nodale per il nostro paese e per la salvaguardia delle istituzioni democratiche nate dalla lotta al nazifascismo: quella di promuovere la cittadinanza democratica secondo i principi della Costituzione repubblicana tra le giovani generazioni.

Nel presente volume – ha scritto Puglielli – abbiamo deciso di riproporre alcuni articoli redatti dalla pedagogista comunista che affrontano, da varie angolature, una tematica a nostro avviso ancora attuale: il rapporto tra educazione scolastica e trasformazione democratica della società.

Di qui una lunga disamina del pensiero e delle proposte di Dina Bertoni Jovine, volta a fare emergere il nucleo centrale e autenticamente innovativo della sua riflessione:

La formazione scolastica non può dunque limitarsi al solo rinnovamento delle metodologie didattiche, all'introduzione e allo sviluppo di metodologie didattiche democratiche. Questo è certamente importante. Ma non basta. Una formazione è realmente democratica se contribuisce a «spezzare con la sua azione nelle coscienze giovanili» gli «interessi di casta, consolidati e mantenuti con il potere». [...] il valore educativo della scuola sta per Dina Bertoni Jovine proprio in questa scelta: nella scelta che essa compie «contro la sclerosi delle forme e dei contenuti mantenuti autoritariamente per inserirsi nel moto di rinnovamento democratico della società»⁴⁸.

È certamente molto opportuno il recupero degli scritti sull'educazione democratica di Dina Bertoni Jovine: una storica e pedagogista che si è a lungo interrogata sui processi di democratizzazione della scuola italiana e sulla formazione democratica alla luce di un'approfondita analisi della storia d'Italia nutrita delle riflessioni di Gaetano Salvemini e di Antonio Gramsci e di un costante confronto con la cultura laica.

Una storica e pedagogista la cui ricerca ci sembra molto attuale, nel momento in cui si rivelano ancora decisamente centrali e ineludibili temi quali la salvaguardia della democrazia e l'urgenza dell'educazione democratica, in una stagione – la nostra – che vede minacciata e messa a rischio proprio la

⁴⁸ *Ibid.*, pp. 17-18.

tenuta democratica del Paese, e che vede la scuola sempre più condizionata da ideologie neoliberiste e da logiche di stampo privatistico ed efficientista.

A differenza dei primi tre, tutti dedicati ad autori e ad opere del XX secolo, il quarto 'classico' accolto nella collana «Educatori di ieri e di oggi» delle Edizioni Conoscenza di Roma fa riferimento al secolo dei Lumi e conferma, sotto questo profilo, come la suddetta collana intenda approfondire l'evoluzione delle dottrine pedagogiche e dei modelli e costumi educativi non solo dell'età contemporanea, ma anche dei secoli precedenti.

Con *Settecento pedagogico e riformatore*, introdotto e curato da Roberto Sani⁴⁹, tuttavia, la novità non riguarda solamente il periodo storico preso in esame, ma anche – e soprattutto – il più ampio e complesso significato attribuito in quest'opera ai 'classici' della pedagogia e dell'educazione. Come precisa, infatti, il curatore:

Se è vero che, nell'accezione tradizionale e universalmente condivisa, per 'classico' della pedagogia e dell'educazione s'intende essenzialmente un'opera di carattere teorico, redatta in genere da uno specialista del settore (filosofo dell'educazione, pedagogista, educatore ecc.), destinata ad esercitare un ruolo di primaria importanza nell'evoluzione del pensiero pedagogico e/o nella pratica formativa e a costituire, in ogni tempo, una continua e incessante fonte d'ispirazione e uno stimolo per una più larga e profonda comprensione dei processi formativi, è altrettanto vero che i testi qui di seguito riprodotti, dovuti in genere non a specialisti del settore, ma a letterati, giuristi, economisti e alti funzionari dell'amministrazione pubblica, e impegnati a ridefinire non i fondamenti teorici e le prassi educative in astratto, ma le concrete politiche scolastiche e formative, gli ordinamenti didattici e gli indirizzi di fondo dell'istruzione pubblica negli Stati assolutistici della penisola, assai difficilmente potrebbero essere identificati *tout court* come 'classici' della pedagogia e dell'educazione.

La scelta, da parte di Sani, di dare spazio agli scritti di personalità quali Scipione Maffei, Gasparo Gozzi, Gian Rinaldo Carli, Gaetano Filangieri e Matteo Galdi, andando necessariamente oltre l'accezione convenzionale sopra richiamata, riflette la precisa volontà di attribuire al concetto di 'classico' della pedagogia e dell'educazione un significato e una portata di gran lunga più ampi di quelli tradizionalmente stabiliti.

Si intendeva, cioè, annoverare tra i *classici* del settore anche quei testi che, scaturiti dalla concreta esigenza di modificare in profondità le istituzioni, i processi e gli stessi costumi educativi di una determinata società, hanno espresso al meglio lo spirito riformatore e le istanze di rinnovamento culturale e civile – oltre che squisitamente pedagogico ed educativo – di una determinata epoca:

I testi riprodotti nella presente raccolta – scrive al riguardo il curatore – s'inseriscono pienamente in questa ultima e più larga accezione di 'classici' della pedagogia e dell'educazione, specie nella misura in cui costituiscono esempi autorevoli di una progettualità scolastica ed

⁴⁹ S. Maffei, G. Gozzi, G.R. Carli, G. Filangieri, M. Galdi, *Settecento pedagogico e riformatore*, introduzione e cura di R. Sani, Roma, Edizioni Conoscenza, 2019.

educativa animata e sorretta da una vera e propria 'pedagogia civile' e ispirata ai valori e agli ideali dell'età dei Lumi⁵⁰.

Di qui la scelta di focalizzare l'attenzione su una trattatistica pedagogica di matrice civile e politica destinata, particolarmente nell'età dei Lumi, ad incidere profondamente sulle scelte dei sovrani assoluti e dei governi preunitari della penisola, ad influenzare la nascente opinione pubblica borghese e ad animare il dibattito sulle riforme della legislazione scolastica e sulle pratiche formative.

Una scelta, si badi, solo apparentemente lontana dal presente ed estranea alle problematiche e alle vicissitudini dei tempi nostri, come testimonia, ad esempio, il complesso e talora controverso rapporto che ancora, sul versante delle politiche scolastiche e formative, caratterizza l'operato dello Stato e le iniziative della società civile, il richiamo al primato della politica e la rivendicazione di una centralità della competenza e dell'apporto della cultura.

Con i due successivi classici, *Un anno a Pietralata* del maestro Albino Bernardini, introdotto e curato da Elena Zizioli⁵¹, e *Globalizzazione lavoro formazione degli adulti. Scritti scelti* di Ettore Gelpi, a cura e con introduzione di Edoardo Puglielli⁵², si torna al '900, e più precisamente agli anni del secondo dopoguerra.

Un anno a Pietralata, edito per la prima volta nel 1968 con la *Prefazione* di Gianni Rodari⁵³, ripercorre la straordinaria esperienza didattica vissuta dal maestro Albino Bernardini in una scuola dell'estrema periferia di Roma, Pietralata appunto, una delle storiche borgate collocate ai margini della Capitale e divenute, fin dagli anni Trenta e Quaranta, luogo di approdo e di residenza di larga parte delle famiglie immigrate dal sud della penisola, come di quelle estromesse dalle vecchie abitazioni del centro storico capitolino a seguito delle ristrutturazioni e degli interventi urbanistici operati dal fascismo e poi della speculazione edilizia avviata negli anni del secondo dopoguerra dai privati e dai grandi enti pubblici nell'indifferenza, quando non nella vera e propria connivenza e complicità, delle giunte municipali democristiane.

Albino Bernardini, come ricorda Elena Zizioli, nel 1960 si trasferisce con la famiglia a Roma dalla Sardegna e, nello stesso anno, ottiene l'incarico d'insegnamento in una scuola elementare di Pietralata, «dove gli viene affidata una classe di bambini provenienti da famiglie appartenenti al sottoproletariato urbano», figli in massima parte d'immigrati meridionali:

⁵⁰ *Ibid.*, pp. 7-8.

⁵¹ A. Bernardini, *Un anno a Pietralata*, introduzione e cura di E. Zizioli, Roma, Edizioni Conoscenza, 2019.

⁵² E. Gelpi, *Globalizzazione lavoro formazione degli adulti. Scritti scelti*, introduzione e cura di E. Puglielli, Roma, Edizioni Conoscenza, 2020.

⁵³ Cfr. G. Rodari, *Scuola e civiltà*, in A. Bernardini, *Un anno a Pietralata*, Firenze, La Nuova Italia, 1968.

Da questa esperienza didatticamente produttiva e ricca di significativi risvolti umani nasce *Un anno a Pietralata*, un libro attraverso il quale – col taglio autobiografico che caratterizzerà pressoché tutte le sue opere – Bernardini dà una vivace testimonianza della sua concezione dell'insegnamento e della funzione sociale della scuola. A quest'opera, nel 1973, s'ispirerà Vittorio De Seta per realizzare *Diario di un maestro*, un film di grande successo, prodotto dalla RAI [...] che avrà il merito di far conoscere ad un larghissimo pubblico di telespettatori un modello di scuola diverso da quello tradizionale e autoritario⁵⁴.

Il testo curato da Elena Zizioli ripropone la *Prefazione* di Gianni Rodari, dal titolo *Scuola e civiltà*, apparsa nell'edizione originaria di *Un anno a Pietralata*. Un testo davvero importante, nel quale Rodari traccia un vivido quanto drammatico quadro della realtà scolastica nelle borgate romane («Una scuola squallida e sporca come una prigionia mandamentale; una squadra di ragazzi che rappresentano il perfetto contrario dei figurini disegnati da Edmondo De Amicis») e, al contempo, ricostruisce con straordinaria precisione e competenza il contributo innovativo offerto dal maestro sardo:

Si intitola *Un anno a Pietralata*: più volte, però, si sospetta che *Un agnello tra i lupi* sarebbe stato un titolo più adeguato, tale il continuo contrasto tra il candore del maestro e la violenta malizia dell'ambiente in cui si muove, senza mai arrendersi. Per i suoi colleghi la borgata, i ragazzi, le loro famiglie sono catalogati in blocco in una definizione dispregiativa: «Che gentaglia! Sono prepotenti e maleducati, non hanno rispetto per nessuno: lei non li conosce, ma se ne renderà conto subito, vedrai!». Un muro poco meno che razzistico divide quegli insegnanti dagli esseri umani – bambini, donne, uomini – tra i quali hanno la sensazione di essere capitati per castigo. Sognano, supponiamo, la bella scuola in centro. [...] Per il nuovo maestro questo schema non ha senso. [...] I ragazzi, così come gli sono consegnati, non gli appaiono né 'educati' né 'maleducati': con questi concetti egli farebbe poca strada. La sua umanità – non mortificata o rinnegata dalla routine scolastica, dai pregiudizi sociali, dall'egoismo dell'adulto che fa un certo mestiere solo per tirarne lo stipendio – gli consente di intuire che ciascuno di quei piccoli 'banditi' (così li chiamerebbe il bidello) è figlio soltanto dei propri istinti e della propria esperienza: si è fatto com'è per vivere in un ambiente disordinato, in cui egli è praticamente senza difesa, e da cui ha imparato che i 'duri' resistono meglio degli altri.

E ancora:

Bernardini confessa e descrive onestamente i suoi fallimenti, le sue cadute. Riferisce le soluzioni che adotta, caso per caso, anche se non è sicuro che siano quelle giuste. [...] Il fatto è che Bernardini non vuole abbellire nulla: né gli altri né se stesso. Non aggiunge nemmeno, se non raramente, notazioni del «senno di poi»: dice quel che è accaduto, quella che precisamente è stata la sua esperienza. Volta per volta, come il lettore noterà benissimo, egli non si comporta come se si trovasse di fronte a un problema pedagogico ben catalogato nei manuali, e per il quale esiste (ma esiste poi?) una soluzione scientifica, la migliore possibile; bensì trovando nella propria umanità la via per arrivare all'umanità dei suoi 'avversari', che egli non considera mai 'nemici'. Forse il succo della sua esperienza è proprio qui: in questo continuo ricorso e richiamo all'umanità. [...] Il maestro che ha scritto questo libro porta

⁵⁴ Bernardini, *Un anno a Pietralata*, introduzione e cura di E. Zizioli, cit., p. 44.

intera la sua umanità nella scuola. Egli è evidentemente al corrente di metodi moderni della pedagogia e della didattica, ma la 'passione' e l'entusiasmo di cui parla non stanno nei limiti della 'passione pedagogica' e dell'entusiasmo didattico'. Non possiamo chiedergli modelli da studiare e da imitare. Possiamo ammirare ed invidiarli la sua sincerità totale, la sua onestà morale e intellettuale⁵⁵.

Di tutt'altro tenore è la raccolta *Globalizzazione lavoro formazione degli adulti. Scritti scelti* di Antonio Gelpi, introdotta e curata da Edoardo Puglielli. Anche in questo caso, si può parlare di un'opera ascrivibile ad una nuova tipologia di 'classici' della pedagogia e dell'educazione.

L'autore, infatti, è tra i più interessanti e autorevoli studiosi italiani in materia di formazione professionale e di educazione permanente, ed ha ricoperto diversi ruoli sul piano internazionale, coordinando fra l'altro progetti e iniziative di educazione degli adulti e svolto l'incarico di esperto delle politiche educative dell'Unione Europea. Presidente, dal 1997, della Federazione Internazionale del CEMEA (Centri di formazione ai metodi di educazione attiva), ha insegnato in diverse università italiane e straniere (Francia, Spagna, Messico, Brasile e Giappone)⁵⁶.

Gli scritti raccolti nel volume, e apparsi a cavallo tra gli anni Novanta e il decennio successivo, approfondiscono il tema della *globalizzazione* e i profondi mutamenti che tale processo ha già prodotto ed è destinato a produrre in misura crescente, in futuro, sul versante del lavoro, dell'educazione degli adulti e della formazione professionale.

Un'analisi di stringente attualità, dunque, che colloca la riflessione pedagogica ed educativa al crocevia delle grandi trasformazioni economiche e sociali e del confronto ideologico e politico che ad esse si accompagna, facendone, in qualche misura, lo strumento non solo di comprensione delle reali dinamiche in atto nell'odierna società globalizzata, ma anche di intervento al fine di scongiurare i pesanti costi umani e sociali prodotti dalle trasformazioni sopra richiamate.

Con riferimento all'educazione degli adulti, ad esempio, è necessario, a detta di Gelpi, sviluppare un approccio critico capace di assicurare, al tempo stesso, «tanto la trasformazione del mondo quanto lo sviluppo delle persone»:

Conoscenza del presente come prodotto storico – scrive al riguardo Puglielli –, demistificazione delle ideologie che lo presentano come l'unico o come il migliore dei mondi possibili, denuncia delle contraddizioni su cui esso si fonda in vista di un loro superamento: sono questi, in breve, gli scopi di una educazione critica degli adulti. Questi scopi, infatti, sono direttamente connessi alla necessità di trasformare un modo di produrre e di esistere in cui eccezionali ricchezze ed eccezionali opportunità di progresso e di felicità convivono accanto

⁵⁵ *Ibid.*, pp. 35-39.

⁵⁶ Cfr. V. Riccardi, *L'educazione per tutti e per tutta la vita. Il contributo pedagogico di Ettore Gelpi*, Pisa, Ets, 2014. Manca purtroppo, nell'introduzione di Puglielli, ogni sia pure essenziale riferimento alla biografia di Ettore Gelpi, a torto, probabilmente, ritenuta scarsamente utile alla presentazione del pensiero e dell'opera dello studioso.

a crescenti manifestazioni di povertà, di decadenza e di barbarie. [...] Si tratta, pertanto, di educare gli adulti a comprendere criticamente il mondo al fine di trasformarlo, al fine cioè di permettere la ricerca di un progetto di emancipazione universale dallo sfruttamento e dall'ingiustizia⁵⁷.

Una pedagogia militante ed eminentemente proiettata sullo scenario politico, oltre che economico e sociale, quella di Ettore Gelpi, della quale Puglielli ci restituisce, attraverso l'analisi degli scritti, un profilo articolato e pienamente calato nei contesti della società globalizzata del terzo millennio.

Ultimo in ordine di tempo, ma non meno significativo, e capace anzi di far compiere un ulteriore salto di qualità alla collana «Educatori di ieri e di oggi» delle Edizioni Conoscenza di Roma, è il volume *La filosofia dell'educazione. Scritti scelti* di Antonio Banfi, introdotto e curato da Massimo Baldacci⁵⁸.

Rimettere in circolazione i saggi di Antonio Banfi sulla problematica educativa – scrive il curatore – non risponde semplicemente a un interesse storico o filologico, bensì ad una precisa questione culturale e pedagogica: possiamo usare il pensiero banfiano di fronte all'odierna crisi socio-culturale e educativa? E quale uso è legittimo farne in proposito?⁵⁹.

Alla luce di questo duplice interrogativo, Massimo Baldacci approfondisce le dimensioni e coordinate fondamentali della riflessione filosofica e pedagogica di Banfi («un pensatore che ebbe una chiara consapevolezza della crisi culturale dei primi decenni del Novecento»), puntando a verificare l'eventuale «attualità della filosofia dell'educazione banfiana come strumento intellettuale per affrontare l'odierna crisi storico-culturale».

L'esito di tale verifica è certamente di notevole interesse: «La sua filosofia dell'educazione – afferma Baldacci con riferimento a Banfi – fornisce un dispositivo critico verso l'ideologia egemone della nostra epoca: il neoliberismo e la sua pedagogia, mostrandosi capace di riattivare i poli sviliti o trascurati da quest'ultima, e di ripristinare così una feconda tensione dialettica tra le posizioni in gioco».

Al riguardo, la riflessione banfiana consente di cogliere e di denunciare l'unilateralità del disegno neoliberista di «una riduzione dell'educazione alla mera formazione del produttore» e, su questo versante, sollecita ad «opporre dialetticamente alla figura del produttore quella del cittadino, riattivando l'idea della formazione dell'uomo nella sua completezza». Allo stesso modo:

Contro la riduzione dell'educazione a coltivazione dello spirito competitivo, la filosofia critica riattiva dialetticamente valori alternativi come la cooperazione e la solidarietà. Contro la riduzione della scuola ad impresa, ripristina la metafora ad essa antitetica della scuola come

⁵⁷ Gelpi, *Globalizzazione lavoro formazione degli adulti. Scritti scelti*, introduzione e cura di E. Puglielli, cit., p. 41.

⁵⁸ A. Banfi, *La filosofia dell'educazione. Scritti scelti*, introduzione e cura di M. Baldacci, Roma, Edizioni Conoscenza, 2020.

⁵⁹ *Ibid.*, p. 7.

comunità. [...] Alla resa dei conti, la filosofia dell'educazione di Banfi è uno strumento critico per dire no alle posizioni che deprimono l'umanità dell'uomo, ripristinando un orizzonte aperto, capace di garantire uno sviluppo libero e multilaterale dell'essere umano⁶⁰.

Una riflessione non solo rigorosa sotto il profilo teoretico, ma anche di stringente attualità, dunque, che si alimenta degli scritti di filosofia dell'educazione dati alle stampe da Antonio Banfi tra il 1921 e il 1931 per lumeggiare le contraddizioni e le derive culturali e pedagogiche del tempo presente.

Conclusioni

In conclusione una collana, quella denominata «Educatori di ieri e di oggi» e diretta da Francesca Borruso, Lorenzo Cantatore, Carmela Covato e Donatello Santarone per le Edizioni Conoscenza di Roma, che ripropone con forza il primato di una *pedagogia critica*, teoricamente fondata e nutrita di senso storico, considerata quale fonte d'ispirazione ed elemento regolativo delle politiche scolastiche e formative del nostro Paese, dopo che, a partire almeno dagli anni Settanta del Novecento, ad ispirare le politiche scolastiche e formative dei governi nazionali sono state, volta per volta, istanze di tipo economicistico o approcci incentrati sul primato delle tecnologie.

Ma anche una collana di classici dell'educazione e della scuola che aspira a stabilire una solida interlocuzione non solo con la ricerca scientifica e l'università, ma anche – e soprattutto – con il mondo della scuola e degli insegnanti, ai quali propone un itinerario di studio tra vecchi e nuovi *classici* inteso a favorire, al di là delle specifiche competenze disciplinari, un'autentica apertura scientifica e a promuovere un approccio critico alla realtà scolastica e alla stessa professione docente, senza riduzionismi, ma, anzi, con una viva sensibilità storica e un indispensabile respiro culturale.

Una scommessa decisamente impegnativa e, per certi versi, rischiosa; e tuttavia, in un'epoca e in una società come le nostre, senza alcun dubbio necessaria, non solo per la scuola e per gli insegnanti, ma per la stessa tenuta della democrazia e della convivenza civile nel nostro paese.

⁶⁰ *Ibid.*, pp. 45-47.

Sulle ali leggere della fiaba: polimorfismo e continuità di un genere letterario

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On the light wings of the fairy tale: polymorphism and continuity of a literary genre

ABSTRACT: This essay aims at exploring a book recently published, *Le metamorfosi della fiaba*. The chapters included in the volume range widely on a literary genre that knows no boundaries of space and time: the classic fairy tale. This kind of storytelling has a polysemic value that allows to put in extreme evidence the formation (or Bildung) of the identity of a subject who, by moving away from known and familiar spaces, finds himself in the dangerous condition of facing trials and obstacles. At the same time, he can see the growth of his abilities, in order to reach a final goal that will place him in a different social status from the initial one, thus allowing him a radical change, fully possible in fantasy, much less verifiable in reality.

EET/TEE KEYWORDS: Fairy tale; Metamorphosis; Children's literature; Bildung; XXth-XXIst Centuries.

La fiaba può a buon diritto definirsi come un genere letterario metatemporale ed universale, talmente pregnante e ricolmo di significati da rivestire la finalità prioritaria di una rassicurante consolazione teleologica, in cui realizzazioni individuali e finalità collettive paiono coincidere in un definito spazio e tempo. Pertanto, allo scopo di analizzare in profondità il genere fiabesco, pare opportuno dotarsi di strumentazioni ben calibrate e multidisciplinari, conformate in modo da attingere gli "utensili" conformi alla ricerca dai più svariati campi disciplinari. Linguisti, pedagogisti, antropologi, studiosi di miti e antiche tradizioni hanno da sempre operato con una convergenza di intenti per scoprire la straordinaria rilevanza che la narrazione ha assunto nella vita delle comunità, fin dagli albori della civiltà. Dal nostro punto di vista di studiosi di letteratura per l'infanzia, la fiaba riveste una valenza polisemica che permette di porre in estrema evidenza la formazione dell'identità di un soggetto il quale, attraverso un allontanamento da spazi conosciuti e familiari, si trova nella pericolosa condizione di affrontare prove ed ostacoli, e nel contempo vede crescere le sue capacità, in maniera da

giungere ad un traguardo finale che lo collocherà in uno status sociale diverso da quello iniziale, permettendogli quindi un radicale mutamento, pienamente possibile nella fantasia, assai meno verificabile nella realtà.

Considerato quindi il livello di complessità del genere fiabesco, non stupisce che le ricerche siano numerose e che conducano a molteplici pubblicazioni che mirano sempre più a farsi fortemente interdisciplinari, ponendo in essere una fertile convergenza di ipotesi di analisi e strategie investigative. Negli ultimi anni si sono cimentate in tale impresa due studiose che appartengono al settore disciplinare della Letteratura per l'infanzia e che hanno intenzionalmente rivolto il loro sguardo analitico alla fiaba, adottando tuttavia un *methodological framework* fortemente innovativo. Da tempo infatti Angela Articoni e Antonella Cagnolati, autrici del volume *Le metamorfosi della fiaba*¹, da cui partirà la mia analisi, hanno portato avanti una linea interpretativa basata sui richiami all'immaginario come *texture* del fiabesco, alla simbologia che, seppur in trasparenza, emerge dalle storie narrate – e che merita uno sguardo attraverso la strumentazione dei *cultural studies* – ai mutamenti dell'intreccio che sfociano in generi *altri* quali il fumetto, la trasposizione cinematografica, l'albo illustrato, i cartoni animati, senza tralasciare il nesso fondante tra letteratura per l'infanzia, *authorship* e scrittura femminile.

Mi preme ricordare qui alcuni preziosi frutti di tale approccio analitico ed investigativo quali, solo per citarne alcuni, *La sua barba non è poi così blu... Immaginario collettivo e violenza misogina nella fiaba di Perrault*², *The borders of Fantasia*³, *Le fiabe nel Terzo Millennio*⁴, nonché vari altri saggi e articoli che riportano alla luce la valenza dell'Immaginario nel vasto e articolato mondo della letteratura per l'infanzia, con lo sguardo rivolto alle permanenze, alle mutazioni e alle riscritture in chiave contemporanea⁵, il tutto a segnalare

¹ A. Articoni, A. Cagnolati (edd.), *Le metamorfosi della fiaba*, Roma, TAB, 2020.

² A. Articoni, *La sua barba non è poi così blu... Immaginario collettivo e violenza misogina nella fiaba di Perrault*, Roma, Aracne, 2014.

³ A. Cagnolati (ed.), *The borders of Fantasia*, Salamanca, FahrenHouse, 2015.

⁴ A. Articoni, A. Cagnolati (edd.), *La fiaba nel Terzo Millennio. Metafore, intrecci, dinamiche*, Salamanca, FahrenHouse, 2019.

⁵ Segnalo in particolare come la produzione di A. Cagnolati si stia orientando sull'Immaginario e sul Fantasy: *La filigrana dell'Immaginario. Note sulla letteratura fantasy*, in G. Cipriani, A. Cagnolati (edd.), *Scienze Umane tra Ricerca e Didattica*, Vol. II: *Le frontiere della didattica tra discipline, competenze e strategie di apprendimento*, Campobasso, Foggia, Il Castello Edizioni, 2019, pp. 501-511; *La magica orditura: dalla prisca sapientia ad Albus Silente*, «Segni e comprensioni», vol. XXXIII, n. 98, gennaio-giugno 2020, pp. 28-41. A. Articoni si occupa da tempo dell'analisi delle fiabe con un approccio interdisciplinare e, oltre al testo succitato sulla figura di Barbablù, ha nella sua produzione più recente: *Lo schermo tra le pagine. Per una rilettura de La bella addormentata nel bosco, genesi e metamorfosi di una fiaba*, «Revista Internacional de Culturas y Literaturas», vol. XXI, 2018, pp. 186-201; *Immagini parlanti e sovversive: narrare le fiabe tra le nuvole*, in Articoni, Cagnolati (edd.), *La fiaba nel terzo millennio: metafore, intrecci, dinamiche*, cit., pp. 175-194 e *L'eterno fascino della fiaba al cinema: tra visioni fantasiose, dark e seduzione*, in Articoni, Cagnolati (edd.), *Le metamorfosi della fiaba*, cit., pp. 51-82.

e implementare un terreno di ricerca dalle molteplici sfaccettature e rifrazioni disciplinari, contraddistinto da una lunga durata e convergenza su temi di notevole spessore e della fertile pluriennale collaborazione di queste due valenti studiose.

Avendo dunque alle spalle una feconda frequentazione su temi e tracce, pare ovvio che il lavoro di ricerca e approfondimenti delle due studiose prosegua: in questa sede intendo riferirmi nello specifico al già ricordato volume di recente pubblicazione intitolato *Le metamorfosi della fiaba* che fin dall'immagine esterna che appare sulla copertina intende introdurci, a passo lento ma sicuro, in un universo dai confini sfumati, evanescenti, che tuttavia fanno intravedere senza alcun dubbio la meta finale. Opera di una giovane illustratrice, Shamila Boffo⁶, il tratto fortemente evocativo ritrae un bambino – accompagnato da un cane – che, probabilmente in fuga da una realtà che non condivide o che lo ha forzatamente allontanato, o forse più semplicemente, desideroso di esplorare il mondo come tutti i protagonisti delle fiabe, si dirige attraverso l'unico sentiero presente, verso un misterioso castello dai confini sfumati, che appare in lontananza (pienamente visibile solo una volta aperte la bandella, in un gioco di mistero e rifrazione): unico bagaglio e patrimonio, un bel libro rosso. In pochi segni grafici viene dunque racchiuso simbolicamente il nucleo fondativo di ogni narrazione fiabesca che si rispetti: un protagonista, uno strumento/dono, una meta, un accompagnatore/aiutante.

⁶ Shamila Boffo, nata a Roma, ha conseguito la laurea in Storia dell'Arte presso l'Università Roma Tre e successivamente ha conseguito il Master in Arte Contemporanea presso l'Università Sorbona di Parigi. «Mi chiamo Shamila Boffo e mi occupo di arte visiva, dal disegno e la pittura tradizionali all'illustrazione per bambini e non; mi piace condividere ciò che imparo, sia attraverso i social (facebook e il mio canale youtube, 'Shamila Art', in primis) sia attraverso corsi di pittura e workshop per adulti. Ho avuto il piacere di far parte di questo progetto realizzando la copertina del libro. In questi casi per me si parte sempre dal messaggio, da ciò che l'immagine deve veicolare e conseguentemente dal medium pittorico che riesca a esprimerlo nel migliore dei modi. Per *Le metamorfosi della fiaba* ciò che non poteva mancare era il riferimento al mondo fiabesco vissuto attraverso un piccolo lettore e alcuni soggetti tipici delle favole e cari alle curatrici del libro (le fate, i libri, la strada intesa come viaggio o cammino dell'eroe). Ho dunque preparato alcune proposte che mettessero in scena, con diverse sfumature, questi elementi. Ad esempio l'oggetto libro poteva essere tenuto dal bambino che osservava le pagine trasformarsi in creature incantate, o diventare una parte del bosco dentro cui si arrampicava; o ancora essere un tappeto volante diretto a un castello lontano. Alla fine è stata scelta l'idea del libro come bagaglio, portato in spalla dal bimbo viaggiatore a mo' di fagotto, con cagnolino al seguito. Penso che i libri siano tutto questo: viaggio, magia, scoperta, esplorazione e uno scrigno di strumenti di cui avvalersi lungo il proprio percorso. Dopo aver familiarizzato con l'immaginario della fiaba attraverso bozzetti e disegni, mi sono dedicata al colore, il cui ruolo è fondamentale nella creazione dell'atmosfera e dell'emozione che si vuole suscitare, per creare infine un'immagine credibile e che risulti un'organica parte di quel mondo. Per i più curiosi, in questo post spiego più nel dettaglio tutti i passaggi che mi hanno portato dall'idea all'immagine: <<https://www.facebook.com/shamilaart/posts/2802471146702500>> (colloquio con Shamila Boffo 9 gennaio 2021). Cfr. anche <<http://www.shamilaboffo.net/>> (ultimo accesso: 12.01.2021).

L'impostazione del disegno trasmette un risultato è senza dubbio di grande impatto ed organico al contenuto del volume stesso⁷. Entrando nella fisicità del libro, si scorge la notevole cura grafica ed editoriale che contraddistingue la nuovissima collana «Wonderland»⁸. Ovviamente «Wonderland» rimanda alle avventure di Alice, meravigliosa e impavida protagonista che personifica il ruolo immaginifico, audace, eterno e peculiare della letteratura per l'infanzia. Come sostengono le curatrici, la collana vuole dare un ruolo di primo piano a tutte le voci che studiano quest'ambito ramificato e intrecciato con molteplici discipline, terra fertile e di confine che ingloba tematiche antiche e metafore moderne: insieme all'evolversi dei temi e degli immaginari, la letteratura per l'infanzia degli ultimi trent'anni ha visto arricchirsi – e di molto – il suo raggio d'azione, aprendo inconsueti filoni narrativi, o innovando quelli esistenti, attraverso rivoluzionarie dinamiche. Una letteratura, quindi, ibrida e aperta ai diversi linguaggi dell'illustrazione, del cinema, del fumetto, della musica, del digitale e che contiene implicazioni storiche, pedagogiche, antropologiche e sociologiche.

Passiamo dunque ad una approfondita analisi dei saggi che compongono il volume. Gabriella Armenise in *Sensibilità moderna e potenza narrativa delle fiabe di Emma Perodi* ribadisce l'attualità delle fiabe perodiane: la creatrice della “nonna narratrice”, ha lasciato un segno indelebile nella tradizione del mondo fiabesco confermandosi quale modello emblematico di una peculiare metamorfosi della fiaba.

Due forme di comunicazione, la fiaba e il cinema, che vivono in un'incessante trasformazione – necessaria per assicurare loro la sopravvivenza – vengono indagate da Angela Articoni in *L'eterno fascino della fiaba al cinema: tra visioni fantasiose, dark e seduzione*. Scrive l'autrice: «La fiaba essendo fornita di elementi magici e fantastici, nel cinema si traspone sovente in sogno, in una ‘visione onirica della realtà’, e si nutre spesso di tale dinamica e del rimaneggiamento del ricordo» (p. 77).

Tempi difficili nella Città grigia. Da Charles Dickens a Philip K. Dick, appunti e idee per fiabe in musica per il Terzo Millennio, di Gian-Luca Baldi, tratta di due proposte per il teatro musicale: la prima che vuole sfruttare la

⁷ «Da sempre per me la copertina di un libro è la carta d'identità del libro stesso e quindi va curata in maniera maniacale, è ciò che il lettore *vede* ancora prima di sfogliarlo. In questo caso, volevo che l'immagine fosse la porta d'accesso all'idea stessa di fiaba, per come da sempre l'ho intesa secondo la struttura proppiana: un protagonista, un ambiente circostante piacevole e ricco di fiori, un percorso (e non sappiamo quanto duro e denso di asperità), un luogo all'orizzonte che può racchiudere altre avventure o semplicemente porsi come meta: cosa può esservi di meglio, dal punto di vista iconografico e simbolico di un castello?» (colloquio con Antonella Cagnolati, 5 gennaio 2021).

⁸ La collana, nata a inizio 2020 da un'idea progettuale di Antonella Cagnolati e Angela Articoni, viene inaugurata da questo primo volume. Altri libri sono in preparazione e verranno pubblicati nel 2021; in corso di stampa attualmente la monografia di A. Cagnolati dal titolo “*I do want him to grow up*”. *Meccanismi identitari e strategie educative nella saga di Harry Potter*.

carica visionaria e fiabesca di *Tempi difficili* di C. Dickens; la seconda che recupera la fiaba di Hansel e Gretel, per rileggerla in chiave futuristica e fantascientifica.

Scrivono Susanna Barsotti, nel suo intervento *Fiaba e albo illustrato: riflessioni su un fortunato incontro*, che «La narrazione dell'albo nasce nello 'scontro' tra il testo delle parole e quello delle immagini, a volte si compone della sola sequenza di immagini» (p. 114), proponendo alcune riflessioni sul felice connubio tra i due particolari congegni narrativi – fiaba e albo illustrato – ed evidenziando come proprio nell'albo illustrato la fiaba trovi oggi il terreno più fertile per riconfermare la sua forza narrativa e la sua valenza pedagogico-educativa.

Il contributo di Irene Biemmi, *Da Rosaconfetto a Una bambola per Alberto. La parità di genere raccontata nei libri per l'infanzia*, evidenzia come la letteratura per l'infanzia non è più solo “dalla parte delle bambine” ma anche “dalla parte dei bambini”: gli stereotipi di genere sono limitanti e dannosi anche nella formazione dell'identità maschile e dunque il ripensamento dell'immaginario deve inglobare anche un discorso sul genere maschile.

In *I do want him to grow up. La saga di Harry Potter come Bildungsroman dell'eroe* Antonella Cagnolati propone le fasi della costruzione identitaria di Harry: «Il messaggio veicolato dall'autrice è assolutamente chiaro, [...]: intendeva far comprendere la difficoltà della crescita, nonché la complessità delle fasi che un preadolescente incontra sul suo cammino per giungere all'adulthood» (p. 168). L'intera saga deve essere interpretata attraverso un prisma pedagogico che ne rifrange le conquiste, adottando quindi la categoria metodologica del *Bildungsroman*.

Lorenzo Cantatore, in *Educare con gli animali nella letteratura per l'infanzia al femminile. Tre casi esemplari*, sviluppa un percorso di lettura e di ricerca sulle autrici Ida Baccini, Beatrix Potter e Marjorie Rawlings che, attraverso un processo creativo nel quale si fondono reminiscenze di schemi della favola e della fiaba, si rivelano profondamente connesse al discorso pedagogico.

«Fra i personaggi meno studiati dell'universo fiabesco vi sono i folletti, minuscole figure magiche, che sono all'origine di un immaginario assai ricco di varianti iconografiche» (p. 211). Folletti moderni, i Brownies, dalla celebre serie dello scrittore Palmer Cox e la metamorfosi, letteraria e iconografica, che subirono nel corso della traduzione del primo libro a essi dedicato – in Italia e in Russia – è il percorso del contributo di Dorena Caroli in *Dai Brownies a Murzilka, metamorfosi di folletti. Per una comparazione della ricezione dell'opera di Palmer Cox in Italia e in Russia*.

Essere nell'immaginario, di Daniela De Leo, esplora la struttura della fantasia con una lettura fenomenologica all'interno della dialettica oppositiva tra rappresentazione e percezione, per delineare il campo dell'immaginario – quale apertura di mondi possibili – con riferimento ai testi *husserliani* sulla fantasia e le immagini. Come confronto esemplificativo utilizza il genere *fantasy*, constatando che – come tutte le fiabe – non propone mai una falsa immagine del

mondo, ma il *fiktum* ha una correlazione alla realtà effettiva, e in questa la sua metamorfosi.

Mattia Di Taranto, con *La fiaba yiddish tra ricerca identitaria e sionismo: Temerl (1917) di Moyshe Broderzon*, sceglie un caso di studio rappresentativo della qualità stilistica e della ricchezza tematica raggiunte dal genere fiabesco yiddishofono fra XIX e XX secolo, sottolineando come sia avvenuta «la straordinaria fioritura nella letteratura yiddish [...] di due generi, segnatamente favolistico e fiabesco, per i quali è lecito adoperare l'etichetta critica di letteratura per l'infanzia» (pp. 276-277), con prodotti letterari di estrema raffinatezza.

In *Come sono andate veramente le cose. Bohdan Butenko e le sue fiabe a rovescio*, Ewa Nicewicz-Staszowska ci svela il mondo fiabesco di uno dei più amati e importanti artisti polacchi, che ha riproposto *Cappuccetto Rosso*, *Cenerentola*, *Hänsel e Gretel* e *Biancaneve* creando singolari riscritture: ha introdotto trame e personaggi di fiabe diverse, invertito ruoli, sfruttato il potere dell'errore, ha fatto ricorso all'iperbole, scombinato le funzioni proppiane, inserendosi, pur inconsciamente, nel filone battuto dal grande Gianni Rodari.

Irena Prosenc, con *Le metamorfosi dei personaggi nelle fiabe di Svetlana Makarovič*, esamina le fiabe moderne di una delle più importanti e prolifiche scrittrici slovene per l'infanzia. «Nel corpus delle fiabe analizzate si riscontrano diverse creature ispirate alla mitologia slava e personaggi tipici della fiaba classica. L'autrice li inserisce in nuovi contesti e attribuisce loro connotazioni diverse da quelle tradizionali, spesso ironiche» (p. 349).

Un volume che può essere dunque considerato un punto di arrivo per le molteplici suggestioni e i percorsi fascinosi che ivi trovano pieno diritto di cittadinanza, nonché uno stimolo aggiuntivo a intraprendere nuove vie, sentieri poco battuti, sempre all'insegna dell'originalità e della fertile interdisciplinarietà.

Emigrazione italiana in Brasile e difesa della fede. A proposito di un recente volume

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Italian Emigration to Brazil and defence of the faith. About a recent volume

ABSTRACT: Within the context of historical research, this contribution analyses an important and recent work of Roberto Sani about the religious care of Italians emigrants in South Brazil. The missionaries' Congregation of Saint Charles, established by Giovanni Battista Scalabrini and Father Pietro Colbacchini, who was also the author of the significant *Guida spirituale per l'emigrato italiano*, had a very peculiar role. In his book Roberto Sani traces the spiritual assumptions and the Congregation's apostolate in a new and careful way. His aim is to highlight the important results of such a capable and spiritual action, which had the main purposes of spreading and enhancing the religious and cultural traditions among Italians emigrants, and of supporting their integration in the new Brazilian context.

EET/TEE KEYWORDS: Catholic church; History of Missions; Missionaries of St. Charles-Scalabrinians; Pietro Colbacchini; Brazil; XIXth-XXth Centuries.

Il recente lavoro di Roberto Sani sul missionario scalabriniano Pietro Colbacchini e la sua opera apre a una molteplicità di considerazioni e s'inserisce nel vasto quadro degli studi dedicati all'emigrazione italiana e in particolare a quella in Brasile¹, insieme a un suo contributo dello stesso 2020 apparso nelle pagine di «History of Education & Children's Literature»². Si tratta davvero di un tema sensibile, con al centro l'immagine, non metaforica e non retorica, di un'altra Italia, tale sia per il dato quantitativo sia per tutto ciò che

¹ R. Sani, «Per conservare la fede dei padri». *La Guida spirituale per l'emigrato italiano nella America del sacerdote scalabriniano Pietro Colbacchini*, Milano, FrancoAngeli, 2020.

² R. Sani, Mons. Giovanni Battista Scalabrini and italian emigration in Brazil: pastoral care, education and national identity (1888-1905), «History of Education & Children's Literature», vol. XV, n. 2, 2020, pp. 449-469.

ha comportato in termini di conservazione della memoria nazionale. E ne è altresì evidente la perdurante attualità, come dimostra la vicenda delle richieste di concessione della cittadinanza italiana da parte di discendenti degli emigrati – richiesta tanto ambita quanto spesso generosamente concessa – sia il rilievo politico della rappresentanza parlamentare degli italiani all'estero.

Com'è noto, la *Storia dell'emigrazione italiana*, con i due volumi sulle *Partenze* e sugli *Arrivi*, curata da Piero Bevilacqua, Andreina De Clementi ed Emilio Franzina, e il volume degli *Annali* della *Storia d'Italia* einaudiana a cura di Matteo Sanfilippo e Paola Corti, rappresentano una sintesi e un punto fermo negli studi in materia, avviando al tempo stesso un'ulteriore e feconda stagione di indagini³. Non è questa la sede per darne conto, se non per ricordare che la ricerca si è ulteriormente consolidata e ha ormai fatto propria la consapevolezza di quanti siano stati gli attori di un fenomeno che ha coinvolto milioni di persone dalla fine dell'Ottocento a oggi, interessando moltissime famiglie italiane⁴.

Ma accanto alle vicende umane – attestate da memorie, diari, testimonianze orali – e in stretta relazione con esse, s'inserisce l'opera delle istituzioni, per prime le rappresentanze diplomatiche italiane dall'Italia liberale a quella repubblicana, con un'accentuazione di tipo diverso durante il fascismo. Molto vivace era la presenza di un vasto associazionismo, dalla ramificata presenza della Dante Alighieri a gruppi con una propria ispirazione ideologica: democratica, repubblicana, socialista nelle sue varie connotazioni, anarchica. Anche in questo caso il regime si distinse per un notevole protagonismo, di cui furono parte essenziale i Fasci italiani all'estero e le loro organizzazioni giovanili, con un forte investimento in termini d'immagine e di propaganda, almeno fino a quando l'andamento della seconda guerra mondiale non costrinse a smorzare i toni⁵.

La rete delle scuole italiane, nonostante la sua inevitabile insufficienza, fu un altro terreno di confronto, dal momento che entrava in gioco la difesa della lingua nazionale, ma la battaglia non poté produrre grandi risultati, anche per la maggiore familiarità degli emigrati con le lingue locali abitualmente d'uso, un aspetto in qualche caso conservatosi a lungo e talora fino a oggi, soprattutto in Brasile, con il mantenimento per esempio di comunità venetofone e in ogni caso rimaste in contatto con i propri luoghi di origine⁶. La promozione

³ Si vedano P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana* (I, *Partenze*; II, *Arrivi*), Roma, Donzelli, 2009 (la prima edizione dei due volumi è rispettivamente del 2001 e del 2002) e M. Sanfilippo, P. Corti (edd.), *Storia d'Italia, Annali 24, Migrazioni*, Torino, Einaudi, 2009.

⁴ Si veda, fra i molti esempi, M. Colucci, S. Gallo, *L'emigrazione italiana. Storia e documenti*, Brescia, Morcelliana, 2015.

⁵ Cfr. A. Ascenzi, *Il fascismo e la mobilitazione della gioventù italiana all'estero. Ideologia e propaganda nei periodici per ragazzi*, Milano, FrancoAngeli, 2020, anche per un rimando all'ampia bibliografia in proposito.

⁶ Si veda, per un primo riferimento, E. Franzina, *Merica! Merica! Emigrazione e colonizzazione nelle lettere dei contadini veneti in America latina*, Milano, Feltrinelli, 1979. Sull'attenzione rivolta

dell'*italianità* rimase tuttavia un tema centrale, perseguito in diverse forme e sempre con l'obiettivo di tutelare gli emigrati sia dal punto di vista culturale sia da quello sociale ed economico, nella consapevolezza di un'appartenenza alla patria che, sia pure nei modi più diversi, rimaneva viva al di là delle Alpi, del Mediterraneo e dell'Atlantico. Ma come non ricordare la drammaticità di un'emigrazione italiana che, dagli anni Settanta dell'Ottocento, da borghese ed episodica che era stata si fa «proletaria», come avvertiva Gioacchino Volpe, quasi un «nuovo moto di indipendenza», questa volta per difendersi dalla miseria, che coinvolge largamente la penisola?⁷ Si tratta in effetti di un elemento di lungo periodo, oggi non meno vivo, se solo si pensa alle rinnovate partenze di tanti connazionali, soprattutto giovani, verso destinazioni migliori ma ancor più al capitolo, drammatico per le conseguenze sociali e le ricadute umanitarie, dell'immigrazione verso l'Italia dai Paesi più poveri dell'Africa e dell'Asia.

Accanto al tema nazionale e patriottico – ripreso soprattutto dalle classi dirigenti come risposta, sia pur tardiva e carente, a un fenomeno spontaneo e imponente nei numeri – si poneva nondimeno quello religioso, nel quadro della ripresa missionaria che lega i pontificati di Gregorio XVI e Pio IX⁸, per consolidarsi con quello di Leone XIII, di cui diventa un elemento caratterizzante anche sul piano dell'immagine⁹. Se veniva riaffermata l'idea di una naturale «identificazione tra cattolicesimo e civiltà» quale fondamento della «politica missionaria» – sottolineata con la lettera *In plurimis* indirizzata da papa Pecci ai vescovi brasiliani nel 1888 in occasione dell'abolizione della schiavitù nel Paese¹⁰ – emergeva sempre più un orientamento di natura pastorale, con un'ulteriore preoccupazione per il continente americano.

Era evidente che vescovi e clero locale non potevano rispondere alle esigenze dei sempre più numerosi italiani che approdavano altre oceano, per motivi del tutto comprensibili legati alla mentalità, alla cultura e alla lingua dei nuovi arrivati, mentre in non pochi casi le riserve con cui questi ultimi erano visti

a questi aspetti dalla politica estera italiana, proprio in rapporto al caso del Rio Grande do Sul, si veda ora G. Romanato, V.B. Merlotti Herédia (edd.), *L'emigrazione italiana nel Rio Grande do Sul brasiliano (1875-1914). Fonti diplomatiche*, [Venezia]-Ravenna, Consiglio Regionale del Veneto-Longo, 2018.

⁷ G. Volpe, *L'Italia in cammino*, Roma, Giovanni Volpe Editore, 1973, pp. 85-89 (prima edizione: G. Volpe, *L'Italia in cammino. L'ultimo cinquantennio*, Milano, Fratelli Treves Editori, 1927).

⁸ Si vedano, per due fra le principali ricostruzioni d'insieme, J. Beckmann, *Le missioni dal 1840 al 1870*, in R. Aubert, J. Beckmann, P.J. Corish, R. Lill, *Liberalismo e integralismo. Tra stati nazionali e diffusione missionaria 1830-1870. Risorgimento italiano-Movimenti cattolici-Ultramontanismo (Storia della Chiesa, diretta da Hubert Jedin, Vol. VIII, n. 2)*, Milano, Jaca Book, 1977, pp. 311-346 e G. Rosoli, *I movimenti di migrazione e i cattolici*, in E. Guerriero, A. Zambarbieri (edd.), *Storia della Chiesa*, Vol. XXXII, n. 1: *La Chiesa e la società industriale (1878-1922)*, Milano, Paoline, 1990, pp. 497-526.

⁹ Cfr. D. Menozzi, *La chiesa cattolica*, in G. Filoramo, D. Menozzi (edd.), *Storia del cristianesimo. L'età contemporanea*, Roma-Bari, Laterza, 1997, pp. 129-257.

¹⁰ *Ibid.*, pp. 180-181.

accomunavano ambienti laici ed ecclesiastici. Si colloca entro queste coordinate, riflesso di una realtà a dir poco difficile, la necessità di individuare strumenti più adatti per mantenere vivo in loro il senso di un'appartenenza religiosa, come avvertiva lucidamente proprio Colbacchini parlando degli immigrati italiani negli Stati meridionali del Brasile in una lettera del 1889, affermando «che senza la pratica della religione, nel giro di 6 o 8 anni, i coloni si abbandonerebbero alla vita del senso, e perderebbero ogni sentimento di religione. L'esperienza lo mostra»¹¹.

È questo l'orizzonte della fondazione di nuovi istituti di vita consacrata, caratterizzati, per così dire, da una scelta missionaria e al tempo stesso americana. Francesca Saverio Cabrini fondò a Codogno nel 1880 la Missionarie del Sacro Cuore di Gesù, aggiungendo al suo nome di battesimo quello del missionario gesuita, e fu invitata dallo stesso Leone XIII a dedicarsi alle Americhe¹², svolgendo un ruolo fondamentale soprattutto per gli emigrati italiani negli Stati Uniti, per quelli che venivano definiti *nuovi barbari*, e non in senso metaforico, da un'opinione pubblica in gran parte ostile¹³, riuscendo altresì a coinvolgere la Chiesa americana¹⁴. Madre Cabrini ebbe sempre modo di godere «della fiducia e della frequentazione diretta» del pontefice, potendogli illustrare «senza diaframmi istituzionali le meraviglie – e i paurosi abissi problematici – della civiltà e del primato americani»¹⁵.

Leone XIII fu largo di incoraggiamenti per due altri istituti religiosi di quegli anni, i Missionari di San Carlo fondati dal vescovo di Piacenza, Giovanni Battista Scalabrini, nel 1887 e le Missionarie di San Carlo nel 1895, come pure nel 1889 di un'associazione di laici impegnati nell'aiuto concreto agli emigranti, la Società San Raffaele¹⁶. Il breve *Libenter agnovimus* del 25 novembre 1887 non solo approvava la nuova fondazione, ma le assegnava come scopo il sostegno agli italiani che si recavano «in Americam» non già per libera scelta, ma «rerum necessitate compulsi»¹⁷.

Roberto Sani, nell'articolo apparso su «History of Education & Children's Literature», ha sottolineato l'originalità dell'intuizione di monsignor Scalabrini, che ne avrebbe segnato l'approccio pastorale aperto alla varietà delle situazioni, il riferimento centrale al rapporto con le famiglie degli emigrati, il legame

¹¹ Sani, «*Per conservare la fede dei padri*», cit., p. 33.

¹² Si veda, fra diverse biografie, L. Scaraffia, *Francesca Cabrini. Tra la terra e il cielo*, Milano, Paoline, 2003.

¹³ Per una ricostruzione di un'opera svolta in condizioni assai difficili ma che pur conseguì importanti risultati, cfr. D. Saresella, *Cattolicesimo italiano e sfida americana*, Prefazione di Giorgio Rumi, Brescia, Morcelliana, 2001, pp. 147-167.

¹⁴ Si veda ora A. Marchesi, *Francesca Saverio Cabrini e la Chiesa statunitense. L'epistolario inedito con l'arcivescovo Corrigan di New York*, Brescia, Morcelliana, 2020.

¹⁵ Rumi, *Prefazione*, in Saresella, *Cattolicesimo italiano e sfida americana*, cit., pp. 7-9.

¹⁶ Cfr. Sani, «*Per conservare la fede dei padri*», cit., pp. 7-10.

¹⁷ *Ibid.*, p. 24.

necessario con una rete di istituzioni scolastiche¹⁸, sviluppando ulteriormente alcuni spunti emersi nel convegno piacentino del 1987, promosso da uno studioso e amico prematuramente scomparso, padre Gianfausto Rosoli¹⁹. Accanto alla scelta di un apostolato americano, si palesa qui un'ulteriore opzione, quella per l'immenso campo missionario offerto dal Brasile, tanto ricco di potenzialità quanto allora problematico. Osserva Roberto Sani:

By way of confirmation of this pastoral approach, the case of Brazil is of special significance, as it is in Brazil that the Scalabrinian Congregation, from 1888, managed the religious and moral assistance of Italian emigrants both in the central and northern states (São Paulo, Minas Gerais, Espírito Santo, Bahia etc.), where the vast majority had found employment as waged workers on the *fazendas*, the large agricultural enterprises of the landowners who had employed slaves until a few years earlier; and in the southern states (Paraná, Santa Catarina, Rio Grande do Sul etc.), where numerous immigrants from Italy had managed to find accommodation and become small owners of family-run farms, through the system of 'free' colonization in plots for ownership by redemption²⁰.

Per entrambe le tipologie di insediamento delle comunità di immigrati italiani, che conobbero non a caso un significativo aumento dopo l'abolizione della schiavitù²¹, le famiglie religiose fondate da Scalabrini seppero elaborare un approccio specifico, attento alle condizioni e alle necessità della popolazione:

As regards the numerous Italian emigrants employed as agricultural labourers in the approximately 2,500 *fazendas* in the interior of Brazil, the pastoral strategy adopted by the Scalabrinians hinged, above all initially, on practice of the so-called «flying missions», that is, on periodic visits by the missionaries to workers employed on the *fazendas* and their families²².

Da questa prima strategia presero avvio, nel giro di pochi anni, oltre centocinquanta chiese «erected on the *fazendas*, destined later to become parishes and, next to them, in most cases, schools were established for the children of Italian immigrants»²³. La cura pastorale esercitata nelle colonie agricole italiane sorte in Paraná, Santa Catarina e Rio Grande do Sul ebbe un grande rilievo nel conservare la fede religiosa e al tempo stesso mantenere viva un'identità linguistica e culturale che rappresentavano una peculiarità delle zone di provenienza di quegli emigrati – fra le Alpi, la grande pianura attraversata dal Po, l'Adriatico – tutte segnate dall'opera della riforma tridentina:

¹⁸ Cfr. Sani, Mons. *Giovanni Battista Scalabrini and italian emigration in Brazil*, cit., pp. 456-465.

¹⁹ Cfr. G. Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, Roma, Centro Studi Emigrazione, 1989.

²⁰ Sani, Mons. *Giovanni Battista Scalabrini and italian emigration in Brazil*, cit., pp. 465-466.

²¹ Cfr. Sani, «Per conservare la fede dei padri», cit., p. 30.

²² Id., Mons. *Giovanni Battista Scalabrini and italian emigration in Brazil*, cit., p. 466.

²³ *Ibid.*

The territories of the southern states destined for agricultural colonisation, as is known, were predominantly populated by peasants from northern Italy (Veneto, Trentino, Lombardy etc.), who left the imprint of their places of origin on the names of the places founded them: to give – just a few examples – Nova Venezia, Nova Milano, Nova Mantua, Nova Brescia, Nova Bassano, Nova Vicenza, Nova Padova, Nova Treviso, Nova Trento²⁴.

Per padre Colbacchini era proprio quest'ultima la tipologia di insediamento a rivestire un maggior interesse pastorale. Rispondendo ai quesiti che gli aveva posto l'internunzio in Brasile, monsignor Francesco Spolverini, osservava acutamente che l'avvenire non era rappresentato dal lavoro salariato nelle *fazendas*, ma dalla «colonizzazione agricola in virtù dell'assegnazione delle terre demaniali agli immigrati disposti a lavorarle»²⁵. È un'intuizione di cui Roberto Sani sottolinea l'importanza e le implicazioni: diversamente dalle *fazendas* e da altre situazioni del Brasile, sfavorevoli per molte ragioni anche di natura politica e culturale, qui si sarebbero riproposte in un inedito contesto «le condizioni socio-culturali già sperimentate dalle popolazioni immigrate nel paese d'origine, rendendo possibile il recupero, sul piano pastorale, di orientamenti spirituali, modelli di vita religiosa, forme di devozione e pratiche di pietà» analoghe a quelle vissute «nelle campagne dell'Italia settentrionale», di cui «il peculiare modello di sacerdote in cura d'anime» costituiva il fulcro essenziale²⁶.

Pietro Colbacchini – nato a Bassano nel 1845, sacerdote della diocesi di Vicenza e presto conquistato dalla causa missionaria che interessava tanti suoi conterranei – si trovava in Brasile da alcuni anni, dov'era quindi entrato nella congregazione scalabriniana, con cui peraltro era già in stretto rapporto. Il suo arrivo in Brasile era stato contrassegnato da un'accoglienza quanto meno fredda da parte del vescovo di São Paulo, legato al modello ecclesiastico di «patronato regio», imposto nei secoli precedenti dalla dominazione portoghese al pari di quella spagnola. Colbacchini aveva risposto impegnandosi senza esitazioni nel primo difficile ministero che gli era stato affidato, presso la colonia italiana di Monserrate²⁷, per poi approdare nel 1886, su richiesta del vescovo locale, a Curitiba, «il capoluogo di quella che era allora la provincia del Paraná», dove in breve tempo riuscì a dar vita a molteplici iniziative, che suscitarono «ampi consensi tra le popolazioni italiane ivi residenti, originarie in larga misura del Veneto»²⁸, e dove ebbe inizio l'esperienza destinata, per opera soprattutto dei religiosi scalabriniani, a dare una forma compiuta alla presenza della Chiesa fra gli emigrati italiani in Brasile.

²⁴ *Ibid.*, p. 467, anche in riferimento a G. Rosoli, *L'emigrazione italiana nel Rio Grande do Sul, Brasile meridionale*, «Altretalia. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. V, n. 10, 1993, pp. 5-22.

²⁵ Sani, «*Per conservare la fede dei padri*», cit., p. 31.

²⁶ *Ibid.*, pp. 40-43.

²⁷ Cfr. *ibid.*, pp. 12-19.

²⁸ *Ibid.*, pp. 19-20.

Colbacchini, provato dalle fatiche, rientrò in Italia per poco più di un anno fra 1895 e 1896, per fare quindi ritorno in Brasile, questa volta nel Rio Grande do Sul, dove proseguì il suo ministero in accordo con il vescovo di Porto Alegre, contribuendo alla fondazione di Nova Bassano, per il non lungo periodo che ancora gli rimaneva da vivere²⁹. I mesi trascorsi in Italia furono soprattutto l'occasione per pubblicare la *Guida spirituale per l'emigrato italiano nella America*, edita a Milano nel 1896 e risultata vincitrice di un concorso bandito dal vescovo di Piacenza e superiore generale dei Missionari di San Carlo Borromeo, monsignor Scalabrini, «per un 'manuale o guida spirituale' dell'emigrante italiano in America»³⁰.

All'opera, destinata a largo e meritato successo, viene dedicata un'analisi puntuale, ricostruendo innanzitutto la genesi e la struttura del testo, a tutti gli effetti un *long seller* nel suo campo³¹. Ma più ancora si mette in evidenza l'approccio al tema da parte di Colbacchini, che colpisce subito per la visione positiva e incoraggiante del fenomeno migratorio, rivelando una profonda sintonia con i suoi interlocutori. Nel richiamo ai disegni della Provvidenza divina, l'autore voleva appunto ricordare loro un elemento tratto dalla quotidianità:

voi avete trovato qui ciò che a molti mancava nella loro patria, non solo il pane quotidiano per vivere, ma certi vantaggi ed agiatezze che non potevate per certo sperare nei vostri paesi. I vantaggi temporali che voi godete qui sono tanti che, sareste veramente ingrati se non ve ne mostraste contenti, e non ne ringraziaste Iddio³².

Da questo nasceva una duplice sfida, declinata sempre in positivo, quella di conservare, da una parte, la fede cattolica e l'identità italiana e, dall'altra, d'inserirsi nel nuovo contesto brasiliano: «L'America è la terra di tutti», davvero riservata «a grandi destini» per formare nel tempo «una sola grande nazione», come stava accadendo negli «Stati Uniti del nord»³³. L'obiettivo, come osserva Sani, è quello dell'«acquisizione di una nuova idea di cittadinanza», fra lealtà nei confronti della patria brasiliana, anche nelle responsabilità civili che si prospettavano, e difesa di una tradizione che proprio uno «stile di vita improntato alla sobrietà» e ripreso da quello caratteristico «delle campagne, venete, lombarde e trentine» non poteva che agevolare³⁴. Un atteggiamento lontanissimo «da chiusure e pregiudiziali di carattere etnico e nazionalistico», come pur qualche studioso ha voluto ravvisare ma di cui Sani dimostra ampiamente l'insostenibilità³⁵.

²⁹ Cfr. *ibid.*, pp. 45-46.

³⁰ *Ibid.*, p. 45; e si veda la *Guida spirituale per l'emigrato italiano nella America del Sac. Pietro Colbacchini Miss. Apost.*, Milano, Officine Tip.-Lit. A. Bertarelli, 1896.

³¹ Cfr. Sani, «Per conservare la fede dei padri», cit., pp. 47-60.

³² *Ibid.*, p. 81.

³³ *Ibid.*, pp. 89-90.

³⁴ *Ibid.*, pp. 90-91.

³⁵ *Ibid.*, pp. 94-95.

Di grande interesse è anche la ricerca delle motivazioni culturali e religiose dell'opera. Analizzando puntualmente i rimandi e le citazioni, per Sani è agevole rinvenirle nella spiritualità nata dalla riforma cattolica – con un richiamo esplicito, fra gli altri a Filippo Neri, Francesco di Sales e Alfonso Maria de' Liguori – nella quale si riflettevano una pietà e una pastorale segnate da «motivi quali la dolcezza, l'amorevolezza, la benignità»³⁶. Lontano da ogni forma di rigorismo, Colbacchini non mancava di ricordare ai suoi emigrati, secondo l'insegnamento di Francesco di Sales, il traguardo della «vera allegrezza» caratteristica del «buon cristiano», che per ciascuno poteva derivare «dalla pace della sua coscienza, dall'adempimento dei suoi doveri e dall'esercizio delle virtù»³⁷. Il lavoro di Roberto Sani, riproponendo all'attenzione dei lettori e degli studiosi una figura di straordinario valore, ha il merito di ricordarne le radici spirituali, che vanno rintracciate fra le pianure e le montagne dei luoghi di origine di padre Colbacchini, ma producono i medesimi frutti nella nuova terra del Brasile.

³⁶ *Ibid.*, p. 80.

³⁷ *Ibid.*, p. 81.

Forum / Discussioni

Renata Lollo's contribution to the history of children's literature in Italy. The genesis and the peculiar approach of the essay *Sulla letteratura per l'infanzia**

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ABSTRACT: This article intends to propose a reflection on the history of children's literature starting from the thought and work of Renata Lollo, an important scholar of the sector now deceased. Therefore, the reader is offered a broad overview of the most relevant lines of research carried out by Lollo during her academic career.

EET/TEE KEYWORDS: History of Children's Literature; Historiographical reflections; Publications; Italy; XXth-XXIst Centuries.

Introduction

I consider it is appropriate to preliminarily clarify that my intervention devoted to Renata Lollo's essay *Sulla letteratura per l'infanzia*¹ is necessarily at the crossroads between critical study and personal testimony. In fact, between February and March 2003, I was asked by Renata Lollo, who had properly completed a first draft of this essay at that time, to proceed with its careful reading and to provide the author with my observations on her work.

* This contribution takes up and develops the topics of the report introduced by the writer of the essay *Sulla letteratura per l'infanzia. Linee di ricerca a partire dagli studi di Renata Lollo* for the Study Day, promoted and organized by the Faculty of Education and the Department of Pedagogy at the Catholic University of the Sacred Heart of Milan on February 16th, 2018.

¹ R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 2003.

As it is known, this work would have undergone further expansions and the partial remaking of some parts, while essentially retaining its basic layout and its original interpretative approach in the final version sent to the publisher.

In addition to the pleasant memory of long conversations (at that time, Renata and I were both professors at the Catholic University and, therefore, the meeting occasions were not rare), I have a series of *emails* dating back to that period and regarding my reading of this essay and the lively and stimulating confrontation with the author, of which I thought it was useful to make use to fully recover the meaning and the scope of this essay, through the observations made by the author herself during our confrontation.

It is hardly necessary to mention that this essay is one of the most relevant results of Renata Lollo's rich and multifaceted scientific production, where there are all the tensions, the anxieties, the aspirations, but also – and why not? – the problematic aspects and the unresolved issues of the original and demanding research on children's literature carried out by the scholar².

1. Between historical reconstruction and «self-understanding» of this discipline: Renata Lollo and the developments of children's literature in Italy in the nineteenth and twentieth centuries

Among the peculiar and most interesting features of the essay published by the Milanese scholar in 2003, I would indicate:

- firstly, an approach to children's literature (or 'Literature for young people', as Renata Lollo sometimes defines it in the wake of Anna Maria Bernardinis³), which is not limited only to the present and restricted to the mere fundamental phenomenological or critical-literary analysis, but convinced of the need to start a serious and detailed comparison with the past through a systematic use of a historiographical method and historical sources;

- secondly, a very specific goal: not a more or less organic and documented reconstruction of the role and the fortune of authors, books, literary currents, editorial experiences, etc., but rather an evolutionary examination of the origins and the developments of a 'self-understanding' process of children's literature in Italy in the nineteenth and twentieth centuries.

² For a first approach to the Milanese scholar's biography and work, see S. Fava, ... *il resto vi sarà dato in aggiunta. Studi in onore di Renata Lollo*, Milan, Vita & Pensiero, 2014, which includes Lollo's detailed biographical profile and an accurate bibliography of her writings.

³ See A. Ascenzi, *La letteratura per l'infanzia allo specchio. Aspetti del dibattito sullo statuto epistemologico di un sapere complesso*, in Ead., *La letteratura per l'infanzia oggi. Questioni epistemologiche, metodologie d'indagine e prospettive di ricerca*, Milan, Vita & Pensiero, 2002, pp. 88-95.

This goal is original and only apparently more restricted and targeted than the one which is normally assigned to an overall history of children's literature; in fact, it is extremely ambitious and difficult to pursue: reconstructing the ways and the styles with which children's literature historically self-perceived and recognized itself with a specific reference to the peculiar scenarios relating to our country and the last two centuries⁴.

Right from the introductory pages of her work, Renata Lollo was convinced of the fact that «there is no children's literature without adults and culture they belong to» and she stressed that, if it was certainly true that «every 'work' for children (also) refers to a creator», that is what she defined as «authorial responsibility»; it was equally true that «the author is not an abstract entity following his/her own feelings, independently of cultural conditioning and various contributions and interferences. In fact, the priorities of a collective unconsciousness, the market demands, the developments in publishing, the distribution and advertising networks, as well as the mass-media and multimedia competition are very important on creation».

Hence the real need to use historical reconstruction in order to fully grasp the genesis and the developments of a complex and extremely articulated cultural discipline:

The scholar concluded: – We are almost insensibly led by a generic 'today' in children's literature, which is the only empirically approachable and without suspicion of memory for too many people, to the perception that there is a past for our culture, which can interact with the present, when other cultures and childhoods already act. [...] Hence, there was the interest in better understanding a particular history of this past, the most forgotten one [...], and the difficult and differently articulated relationship between literature and educational reflection and between this one and political power⁵.

In the light of these premises, it is not surprising that different authors and various works of children's literature printed during the nineteenth and twentieth centuries were not directly at the centre of the reconstruction carried out by Renata Lollo, but there were rather those particular typologies of publications, which historically allowed the «Italian creative literature for children» to bring out «its complex specificity», thus fostering and triggering off a self-understanding process of this discipline, according to the scholar⁶.

With reference to the nineteenth-century phase and, in particular, the period between the Unification (1861) and the end of the century, Renata Lollo identified that particular typology of school textbooks with reading books used in popular primary schools, magazines primarily addressed to young readers and Italian translations of literary works for children (fairy tales, short stories,

⁴ Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 13-14.

⁵ *Ibid.*, pp. 16-17.

⁶ *Ibid.*, p. 31.

novels, etc.) published in other countries among the main 'markers' of this emerging children's literature.

The attention paid by the scholar from the Catholic University of Milan to each typology of texts and the contribution they made to the maturation of a wider awareness of the «importance for children to read» and the need «to better grasp the (little) readers' tastes and points of view»⁷ in the adult world is significant.

Thus, after underlining the indissoluble link among children's literature, literacy and primary education processes and peoples' enculturation and civilization throughout the nineteenth century and most of the twentieth century, Renata Lollo concluded: «The textbook, which is read and used in the classroom to educate, remains the only one known in life for many children and young people. [...] Pietro Dazzi, Pietro Thouar and Cesare Cantù will remain among the authors who were able to offer examples and ideas which could be integrated into school work and the most quoted and re-read ones, even after the turn of the century»⁸.

Similarly, the pages devoted to a series of children's magazines in the nineteenth century, which are not studied yet and not completely ignored by specialists, are very interesting, such as in the case of the nineteenth-century «Le prime letture» (1870-1878) by Luigi Sailer and «Il Giornale per i Bambini» (1881-1889) by Ferdinando Martini; and the early twentieth-century «Il Giornalino della Domenica» (1906-1911) by Luigi Bertelli (*Vamba*) and «Il Corriere dei Piccoli» (1908-1931) by Silvio Spaventa Filippi⁹.

Finally, with reference to the «translations affecting children in their readings», Renata Lollo repeatedly drew attention to the ones which had had as their subject very important texts, such as the *Fables* by La Fontaine, the novels by Charles Dickens, *Gulliver's Travels* by Jonathan Swift, *Little Women* by Louise May Alcott, the *Little Lord* by Francis Hodgson Burnett, the *Fables* by the Brothers Grimm and the *Fairy Tales* by Andersen. After giving original cues for reflection, the scholar from the Catholic University of Milan stressed the need to pursue new lines of investigation on this field: first of all, the one concerning «relationships and exchanges between translators for an adult audience and translators committed for children, in order to precisely grasp both philological-literary aims and a different awareness of the destination of one's options to childhood»¹⁰.

⁷ *Ibid.*, p. 40.

⁸ *Ibid.*, pp. 19-21.

⁹ *Ibid.*, pp. 22-28 and 32-46.

¹⁰ *Ibid.*, pp. 28-30.

2. *Manuals and compendia about history of children's literature intended for primary school teachers' training: an essential source for reconstructing the «self-understanding process» of this discipline*

In its central part, i.e. from the third to the seventh and penultimate chapter, Renata Lollo's essay *Sulla letteratura per l'infanzia* focuses its attention on a typology of texts which has only recently been the subject of a systematic and wide-ranging analysis¹¹ and, conversely, has received a quite episodic attention until that moment¹². I intend to essentially refer to manuals and compendia about *history of children's literature*, published starting from the Gentile reform in 1923 and primarily aimed at the teachers who had been training for the competition for a teaching post and headmasters and the students from normal and teachers' training schools, in whose study programs there was the examination of the «historical plan» of this discipline, considered fundamental in childhood educators and primary school teachers' training for several reasons, as it is well known¹³.

Created with the specific and restricted goal of providing primary school teachers and trainees with a chronological and essential framework of the main authors and the most authoritative and successful literary works in this field, these manuals and compendia ended up determining the real 'official canon of children's literature' with heavy schematisms and omissions in Italy in the nineteenth and twentieth centuries on the one hand; and also being a sort of overall interpretation for the historical course carried out by children's literature, with obvious simplifications and reductionisms in this case, over the last two centuries on the other hand. It must be underlined that this interpretation was generally lacking in a solid historiographical anchoring and oscillated between moral and pedagogical requests and vague and ill-concealed aspirations to bring analysis back within the epistemological bounds of aesthetics and literary criticism.

The fact is not too surprising if only it is taken into account that most of the authors of manuals and compendia about history of children's literature were primary school teachers, headmasters and school inspectors, as well as pedagogists, writers of textbooks and experts in training processes, generally lacking both in real and solid literary knowledge, as well as an indispensable

¹¹ See A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, 2 vols., Milan, FrancoAngeli, 2018, Vol. 2, pp. 7-29.

¹² For example, see the references in A. Faeti, *La valle della Luna*, in E. Beseghi, *La valle della luna. Avventura, esotismo, orientalismo nell'opera di Emilio Salgari*, Florence, La Nuova Italia, 1992, pp. 1-75.

¹³ See A. Ascenzi, R. Sani, *Per una storia della storiografia sulla letteratura per l'infanzia nell'Italia dell'Otto e del Novecento*, a report which was introduced at the study conference on the topic «Scrivere, leggere, raccontare. La letteratura per l'infanzia tra passato e futuro», held in Genoa from 19th to 21st January 2017, whose acts edited by Anna Antoniazzi are being published by the Milanese publisher FrancoAngeli.

and strong historical education. In some cases, however, in the face of the lack of adequate cultural tools and effective historiographical skills, it is possible to find the prevalence of heavy ideological and/or confessional conditioning in the analysis of the historical course taken by children's literature in the nineteenth and twentieth centuries.

Far from only fulfilling the original function of didactic support for training teachers and management and inspection staff in compulsory education, it is well understood how this very wide and pervasive production of manuals and compendia has actually ended up spreading and rooting a certain conception for history of children's literature at least until the 1970s, in relation to which the need to carry out a deep revision has prevailed only in relatively recent times¹⁴.

It is worth noting that Renata Lollo is not particularly interested in the peculiar historiographical interpretation of children's literature in the Italian nineteenth and early twentieth centuries and, even less, the typology of reading and the judgments formulated about each author and the most relevant works which appeared on this field in the same period in her detailed analysis of this rich «essayistic and manual production» (to put it in her words).

What really interests the scholar from the Catholic University of Milan is highlighting styles and methods through which the writers of the above-mentioned manuals and compendia about history of children's literature have defined and represented this discipline, that is, to what extent this «essayistic and manual production» intended for teachers and primary school has contributed to the promotion of the «self-understanding process of children's literature»¹⁵ since the Gentile reform in 1923.

On this regard, it is not surprising to find the systematic character and depth of the investigations carried out by Renata Lollo on the biography of the authors of manuals and compendia – from Olindo Giacobbe to Vincenzina Battistelli, from Ugo Zannoni to Giuseppe Fanciulli and Enrichetta Monaci Guidotti, up to Onorato Fava, Olga Visentini, Luigi Santucci, Mario Valeri, Piero Bergellini, Ottavia Bonafin, Antonio Lugli, Lina Sacchetti and Enzo Petrini, to only name the best known and the most successful ones –; as well as the constant references to the relationships between this «essayistic and manual production» and «the most general history of textbooks» and teaching training along the early twentieth century¹⁶.

Moreover, it is also clear that a strictly historiographical instance did not support and foster the scholar's research in this case, but rather the awareness that a discipline with uncertain origins, a nebulous past and blurring and

¹⁴ Ascenzi, Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, cit., Vol. 2, pp. 26-29.

¹⁵ Lollo, *Sulla letteratura per l'infanzia*, cit., p. 134.

¹⁶ *Ibid.*, p. 115 and the following pages.

indefinite boundaries, such as children's literature, could finally have reached any certainty at an epistemological level only through the recovery of its own past, that is, its authentically historical soul and dimension, – carried out in organic and rigorous ways –.

Not surprisingly, in the eighth and last chapter of the essay *Sulla letteratura per l'infanzia*, Renata Lollo set aside its historical reconstruction to focus her attention on the contribution offered by the reflection of the Bolognese scholar Antonio Faeti¹⁷ and the Paduan pedagogist Anna Maria Bernardinis¹⁸ to the «self-understanding of this discipline».

3. Renata Lollo at the crossroads between 'Faeti's revolution' and Anna Maria Bernardinis's personalist option

First of all, while recognizing that it could appear «very imprudent and presumptuous» even just trying to trace «a credible profile» of the scholar and professor at the University of Bologna, who had been «the first one who wanted and obtained the entitlement of the marginalized children's Literature», Renata Lollo provided a careful examination of what she defined as «Faeti's revolution of the dislocation of children's literature from the 'literature' traditionally considered in the communicational context» in this last chapter of her essay, by virtue of which this discipline had succeeded in breaking the isolation where the Crocean prejudices and, more generally, the rigid canons of neo-idealist aesthetics had confined it.

On this regard, the scholar from the Catholic University of Milan emphasized how Antonio Faeti had succeeded in affirming «the legitimacy of children's literature», introducing it «in the cultural context with an interpretative freedom deriving from the assumption of a substantially communicational point of view, without any declared conditioning», going beyond the sterile question of whether or not this literature was a real «aesthetic product».

However, the innovative scope of such a turning point was going beyond. Renata Lollo has still noted that children's literature acquired an undoubted sociological value in Faeti's meaning enough to prove to be a formidable «tool for understanding the ruling class's ideologies». The scholar concluded: «If one could previously talk about the relationship between literature and

¹⁷ In particular, from Antonio Faeti's wide and composite scientific production, Renata Lollo mainly examined the contributions *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, Turin, Einaudi, 1972; and *Letteratura per l'infanzia*, Florence, La Nuova Italia, 1977.

¹⁸ From Anna Maria Bernardinis's scientific production, Renata Lollo mainly examined the encyclopedia entry *Letteratura giovanile*, in M. Laeng, *Enciclopedia pedagogica*, Brescia, La Scuola, 1990, Vol. IV, cc. 6717-6732.

pedagogy, here it is reformulated as the relationship between communication and ideology»¹⁹.

As it can be seen, Renata Lollo clearly grasped the effective scope and the last consequences of Antonio Faeti's reflection, which – in the wake of what Umberto Eco had already carried out on the field of «popular literature» during the 1960s and 1970s²⁰ – marked the breakdown of both the traditional literary/aesthetic feature and the equally traditional pedagogical/theoretical one: a sort of real caesura and 'point of no return' compared to the past.

In fact, on this regard, it was possible to record not only the loss of an *aesthetic dimension* («once admitted, accepted or experienced that it [children's literature] is not and cannot be a poetic language which creates styles»), but also the replacement of *pedagogy*, considered as a theoretical construct, a philosophy of education with mass culture, ideology, mentality and widespread educational habits; as well as it was recorded the definitive decline of that conception of children's literature, by virtue of which it essentially turns out in the intimate relationship between *author* and *reader* and it pedagogically has – it must have! – the priority aim at «taking charge of the progressive structuring of the growing person», that is, «increasing the interpretative, relational and inventive skills» of the *reader*²¹.

At this point, it is necessary to wonder: for what purpose does Renata Lollo stop examining the research focused on the same topics of the Paduan pedagogue Anna Maria Bernardinis with equal rigor and depth at the end of the long and complex examination of Antonio Faeti's epistemological and cultural reflection?

Is it only the legitimate and understandable desire to offer the reader, who has almost reached the end of the essay *Sulla letteratura per l'infanzia*, the opportunity for a comparison between two concepts of this discipline, which are both recent and long pondered, although radically divergent and not entirely opposite?

It is very likely that there was *also* this goal in the intentions of the scholar from the Catholic University of Milan.

However, in my opinion, the peculiar structure of the chapter and, in particular, the convinced acknowledgments paid to the Paduan scholar's epistemological and pedagogical reflection (Renata Lollo writes: – «The interpretative line identified by Anna Maria Bernardinis appears the most convincing one in outlining the evolutionary steps» of this discipline) would seem to reveal something else.

¹⁹ Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 246-253.

²⁰ See U. Eco, *Apocalittici e integrati. Comunicazioni di massa e teorie della cultura di massa*, Milan, Bompiani, 1964; Id., *Il superuomo di massa. Retorica e ideologia del romanzo popolare*, Milan, Bompiani, 1976.

²¹ Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 267-268.

The hypothesis that I try to advance is that the scholar from the Catholic University of Milan was unable to fully accept the radical and inevitable consequences of this assumption, that is, the necessary loss of a discipline, such as *children's literature* (likewise what had previously happened with the *popular literature* considered by Umberto Eco), as much from the traditional literary and aesthetic context as from the (equally traditional) one of pedagogical theory, while appreciating in many ways «Faeti's revolution of the dislocation of children's literature from the 'literature' traditionally considered in the communicational context» (to put it in her words).

In other words, while *Faeti's split* attributed to this discipline a full autonomy and a much greater heuristic potential on social reality and cultural and customs processes characterizing it, it inexorably threatened to compromise its purely educational purpose, that is, the role played in order to make «the growing person more mature with his/her specific questions, precisely in view of the freedom which radically connotes him/her», consequently repositioning children's literature no longer at the crossroads of the relationship between «literature and pedagogy», but «between communication and ideology» (to use the author's words again)²².

On this regard, it was not accidental the choice to contrast Antonio Faeti's theoretical reflections with the Paduan pedagogue Anna Maria Bernardinis's ones, whose research was included in the personalist perspective of a *children's literature*, essentially considered as a *reading and literature pedagogy for young people*, where literary and pedagogical dimensions appear closely intertwined and the characterization of *childish/for childhood* and/or *youth/for young people* even loses its natural reference to the potential readers' personal condition to change into what the Paduan scholar identifies as a sort of «interior disposition of the spirit», destined to persist (or to find himself/herself) in every age and «existential condition»²³, as it is well known.

As further proof of what we have been saying so far, it seems appropriate to point out the calm reflection with which Renata Lollo reiterates the centrality of a pedagogical dimension (and an «educational responsibility») in structuring the knowledge of a discipline, such as children's literature, in the conclusions of the essay *Sulla letteratura per l'infanzia*:

Pedagogical studies seem to have also suffered from significant crises in the difficulty of getting out from Gentile's culture, sometimes using an ideological, psychological or sociological-communicational language. However, it is for pedagogy a planning role which does not seem to be suppressed, without very serious consequences on the people's maturation and the «possible» improvement of the extended relationships characterizing society.

²² *Ibid.*, pp. 267-268.

²³ *Ibid.*, pp. 268-269.

Hence – and it is still the scholar from the Catholic University of Milan who speaks – the need for a «creative and planning pedagogy», which redefines the basic features and re-proposes the goals of a discipline which claims «the immense contribution of literature (and, therefore, an authentic reading as a personal meeting with the text) to the people's growth», «with an originality which is unmatched in the main pedagogical and literary studies», as Anna Maria Bernardinis theorized²⁴.

At this point, a question naturally arises: and History? Or rather: and the role of the *historical reflection*, from which we have started and has characterized and fostered most of the research carried out by Renata Lollo in the essay *Sulla letteratura per l'infanzia*?

In the context of a conception of children's literature, such as the one mentioned above, History (the historical reflection) ends up playing a necessarily *subsidiary, ancillary*, useful and particular function, as the author warns:

Renata Lollo points out: – The historical rereading can accompany and support the perception of the signs for the present, which let us look ahead at the future and the life of new generations. It does not allow us to remove the mercilessly emerging limits of a temporal distance, it also helps to become aware of a training past, which had its costs and values together, and it always invites us to start again with renewed awareness towards that «possible improvement» which makes us go on pursuing with a free spirit and perseverance²⁵.

Conclusions

In conclusion, an essay, such as *Sulla letteratura per l'infanzia* by Renata Lollo, which widely draws on a historical dimension and provides a very interesting contribution to examine the history of this discipline, allows us to grasp the results of a various and complex study and research course, which is not devoid of problematic aspects and unresolved issues, but it is certainly destined to effectively compare with today's pressing questions and new and complex challenges and to bring up for discussion both traditional and consoling commonplaces and sterile certainties again.

In this context, while widely and correctly using the methodologies and the tools of a historical investigation, Renata Lollo does not attribute a real autonomy and centrality to the historiographical reflection in the field of children's literature. Her well-known interest in the historical reconstruction of the past of this discipline reflects an approach, which also belongs to many other

²⁴ *Ibid.*, pp. 271-272.

²⁵ *Ibid.*, p. 275.

talented scholars, who mainly focus on the pedagogical or literary dimension (or both of them).

However, an essay, such as *Sulla letteratura per l'infanzia*, precisely has the merit of pointing out the goodness and the undoubted potential to systematically and rigorously study the past and its literary works, which were mainly intended for children, boys and girls, to established scholars and young people who are approaching historical research in the field of children's literature today, for what it reveals from the point of view of the historiographical excavation and the consequent extension of our knowledge for the past which this excavation implies, even without theorising it, nor claiming it as an effective merit.

The itinerary of recent children's literature in Italy. Renata Lollo's epistemological and historiographical contribution*

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ABSTRACT: Starting from the analysis of Renata Lollo's epistemological and historiographical contribution, an important scholar now dead, this article intends to analyze the most relevant and interesting lines of research relating to the history of children's literature in Italy during the last fifty years.

EET/TEE KEYWORDS: History of Children's Literature; Historiographical reflections; Publications; Italy; XXth-XXIst Centuries.

In the early 2000s: there is a significant revival of the epistemological question in the context of *children's literature*; a revival which originated from two contiguous and extremely significant events. On the one hand, the permanent inclusion of *children's literature* among the disciplines which made up the study plan of the new Primary Education Sciences Degree Course and, more generally, among the disciplines taught in the Degree Courses of the new-born Faculty of Education¹. On the other hand, the establishment and

* This contribution takes up and develops the topics of the report introduced by the writer of the essay *Sulla letteratura per l'infanzia. Linee di ricerca a partire dagli studi di Renata Lollo* for the Study Day, promoted and organized by the Faculty of Education and the Department of Pedagogy at the Catholic University of the Sacred Heart of Milan on February 16th, 2018.

¹ See the Ministerial Decree of 2 August 1995 – *Modificazioni all'ordinamento didattico universitario relativamente alla trasformazione della facoltà di magistero in facoltà di scienze della formazione*, «Gazzetta Ufficiale della Repubblica Italiana», on November 11th, 1995, n. 264; and the Ministerial Decree of 26 May 1998 – *Criteri generali per la disciplina da parte delle università degli ordinamenti dei corsi di laurea in scienze della formazione primaria e delle scuole di specializzazione all'insegnamento secondario*, «Gazzetta Ufficiale della Repubblica Italiana», on July 3rd, 1998, n. 153. About the meaning and the extent of the transformations introduced in the university context in this field in the 1990s, please see E. Beseghi, *La letteratura per ragazzi*

the guarantee of a plurality of chairs (after the pioneering and solitary one held by Antonio Faeti) – in Bologna (Emy Beseghi), in Genoa (Pino Boero) and in the Catholic University of Milan (Renata Lollo) – which were specifically devoted to *children's literature* and formally different from the chairs of Pedagogy, Didactics and History of Pedagogy too, although they were fully included among the chairs belonging to the scientific-disciplinary sectors of the pedagogical area (specifically M09Y and, later, M-PED/02)².

As it is well known, at the origin of the renewed epistemological debate, there was the need to define the object of study, goals, methods and approaches of a discipline which had largely moved not only outside the academic and scientific sphere until then (mainly as knowledge linked to primary schools and teachers' training)³, but it had also been the subject of prejudicial attitudes and heavy reservations in the aesthetic and literary sphere for a long time, as evidenced by Benedetto Croce's well-known critical positions⁴; as well as a real reduction to an ancillary condition, which was deprived of authentic autonomy by Gentili's philosophy of education characterizing the school and culture of our country for a long time, as regards the exquisitely pedagogical and educational sphere⁵.

The lively debate on the epistemological nature of *children's literature*, which developed in our country in this phase, anchored to some questions which we could define very important and focused its attention on the meaning this discipline has in the category of social sciences and education.

Antonio Faeti, to whom the undoubted merit of having inaugurated the cultural recovery of *children's literature* in Italy has been unanimously recognized starting from the 1970s, especially with the two volumes *Guardare*

nell'Università italiana, in *Letteratura per ragazzi in Italia, Rapporto annuale 1995*, Turin, Piemme, 1995.

² As it is known, with reference to the scientific-disciplinary sector M-PED/02 (History of Pedagogy), which replaced the previous M09Y one (History of Pedagogy), the Ministerial Decree of 23 December 1999 – *Rideterminazione dei settori scientifico-disciplinari* («Gazzetta Ufficiale della Repubblica Italiana», on May 1st, 2000, n. 3) set the following declaratory judgement of the related disciplines: «Studies in this sector concern the reconstruction of the historical development of reflection and pedagogical research, the development of schools, institutions and educational practices, considered in the belonging social-cultural context, as well as history and children's literature».

³ See A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, 2 vols., Milan, FrancoAngeli, 2018, Vol. 2, pp. 7-29 (Introduction).

⁴ See A. Ascenzi, *La letteratura per l'infanzia allo specchio. Aspetti del dibattito sullo statuto epistemologico di un sapere complesso*, in Ead., *La letteratura per l'infanzia oggi. Questioni epistemologiche, metodologie d'indagine e prospettive di ricerca*, Milan, Vita e Pensiero, 2002, pp. 88-95; and A. Ascenzi, *La letteratura per l'infanzia come 'fonte' per la storia dei processi culturali e formativi*, in F. Bacchetti, *Percorsi della letteratura per l'infanzia. Tra leggere e interpretare*, Bologna, Clueb, 2013, pp. 29-47.

⁵ See A. Ascenzi, R. Sani, *Il libro per la scuola tra idealismo e fascismo. L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiorri (1923-1928)*, Milan, Vita e Pensiero, 2005.

le figure (1972) and *Letteratura per l'infanzia* (1977)⁶, which marked a turning point and the launch of a new research tradition⁷, stressed his exquisitely pedagogical approach in an attempt to define the epistemological profile of this discipline on several occasions⁸.

In the essay *Il giardino e il labirinto*, this opinion was lately re-proposed by Emy Beseghi, who rightly claimed to Faeti and the *Bolognese school* the merit of having inaugurated a research line destined to deeply innovate the studies of this sector in Italy: the imagery conveyed and evoked by children's literature has been investigated starting from an exquisitely pedagogical perspective, for whose examination the contributions offered by other disciplines (first of all, history of literature, history and criticism of literary genres, philosophy of language, linguistics, history of painting and illustration) are used as indispensable tools for analysis and decoding and activated and put forward every time to highlight various aspects of that complex 'device', consisting of texts for children and young people, which are analytically broken down with the help of a mass of an eminently specialist linguistic-literary knowledge, but globally re-included in a pedagogical and historical-educational perspective⁹.

The Paduan scholar Anna Maria Bernardinis had an undoubtedly different position and the great merit of having animated and coordinated a dense network of initiatives and having promoted a series of study and research groups in this sector starting from the 1970s is rightly attributed to her¹⁰. Bernardinis argued that there was still a long way to go as regards the determination of a precise epistemological profile attributable to the discipline which she preferred to define *youth literature*. In fact, after requiring to take stock of the studies carried out up to the 1990s and to outline the results of the possible and desirable research perspectives, the scholar had stressed how the epistemological status of this discipline could not be considered adequately defined yet.

⁶ See A. Faeti, *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, Turin, Einaudi, 1972; Id., *Letteratura per l'infanzia*, Florence, La Nuova Italia, 1977.

⁷ See A. Faeti, *La situazione dello studio e della ricerca sulla letteratura per l'infanzia*, in *Letteratura per ragazzi in Italia. Rapporto annuale 1995*, Turin, Piemme, 1995.

⁸ For example, please see the introduction to A. Faeti, *I diamanti in cantina. Come leggere la letteratura per ragazzi*, Milan, Bompiani, 1995.

⁹ E. Beseghi, *Il giardino e il labirinto*, in Ead., *La cattedra di Peter*, Campi Bisenzio, Li.B.eR., 1996.

¹⁰ About the Paduan scholar Anna Maria Bernardinis's pedagogical and literary reflection, please see now the documented works by D. Lombello, *La letteratura per l'infanzia a Padova*, in W. Böhm, L. Santelli, G. Zago, *Il contributo della «Scuola padovana» allo sviluppo delle scienze pedagogiche e didattiche*, «Rassegna di Pedagogia», vol. 66, 2008, pp. 309-317; and by G. Zago, *L'insegnamento di Storia della pedagogia nel Magistero di Padova (1955-1980)*, in Id., *Sguardi storici sull'educazione dell'infanzia. Studi in onore di Mirella Chiaranda*, Fano, Aras Edizioni, 2015, pp. 431-456; and Id., *Il contributo di Anna Maria Bernardinis (1932-2017) alla pedagogia della letteratura per l'infanzia*, «History of Education & Children's Literature», vol. XII, n. 2, 2017, pp. 629-637.

On this regard, she believed that such a result could be only achieved through a critical examination of different epistemologies underlying literary and pedagogical knowledge. In fact, the multidisciplinary structure of a certainly complex research area, as it is located at the confluence of various skills, could only have become organic and unitary, as well as fully specific and autonomous under these conditions¹¹.

In those years, Pino Boero had largely divergent positions. In fact, if Anna Maria Bernardinis considered absolutely priority and indispensable to devote a preliminary and specific critical reflection to epistemological problems to the point that, as she affirmed, any approach aimed at historically determining features, itineraries and evolutionary modalities of *youth literature* would be rather meaningless in the absence of a precise and autonomous epistemological status of this discipline, on the contrary, Pino Boero seemed unwilling to emphasize the epistemological dimension and, in particular, to consider it an indispensable preliminary clarification.

The Genoese scholar contrasted the centrality, which was granted by various lovers of *children's literature* to the reflection on the fundamentals and the specific identity of this knowledge, to the centrality and the urgency of an examined systematic exploration and excavation aimed at recovering the features and the movements historically assumed by a literary and educational experience together, which was still studied and valued only a little, such as precisely the one relating to the universe of books for children and young people, where he included even the schooltexts¹².

Far from resolving itself in a simplistic and incomprehensible liquidation of an epistemological instance, Pino Boero's reflection emphasized the need for rethinking the investigation aimed at examining the fundamentals of a knowledge which we define *children's literature*. More precisely, Boero did not intend to minimize – or to still badly set aside – this epistemological issue, but he would rather draw the attention to the abstractness and the scarce usefulness of those approaches which aim at determining the nature, the features and the purposes of a discipline a priori.

We can find Renata Lollo's contribution in the wake of this complex and articulated reflection, which was destined to characterize *children's literature* between the late 1990s and the beginning of the new decade. It is worth specifying as a preliminary statement that this contribution finds its main references in some texts which appeared in that period. First of all, we intend to refer to the entry *Letteratura giovanile*, edited in *Il Dizionario di Scienze dell'Educazione*

¹¹ A.M. Bernardinis, *Letteratura giovanile*, in M. Laeng, *Enciclopedia pedagogica*, Brescia, La Scuola, 1990, Vol. IV, cc. 6717-6732.

¹² See P. Boero, C. De Luca, *La letteratura per l'infanzia*, Rome-Bari, Laterza, 1995 pp. VII-XI (preface). But also see the most recent and stimulating reflections formulated in P. Boero, *Infanzia della lettura, letteratura per l'infanzia*, in *Letteratura per l'infanzia*, a monographic issue of «Studium Educationis», vol. V, n. 3, 2000, pp. 454-456.

and published by the Salesians PELLEZO, Nanni and Malizia first in 1997 and then in a new edition in 2008¹³; as well as the article *Lo spazio del leggere come crocevia di relazioni*, published in 2000 in the Paduan magazine «*Studium Educationis*», in a monographic issue devoted to *children's literature*¹⁴; finally, the essay *La letteratura per l'infanzia tra questioni epistemologiche e istanze educative*, which appeared in 2002 in the volume *La letteratura per l'infanzia oggi*, edited by your truly speaker¹⁵.

A first aspect to be highlighted: the substantial coherence and linearity of the reflection developed at an epistemological level by Renata Lollo, who has supported a point of view destined to be taken up again and gradually examined and clarified in the following works since the entry of *Il Dizionario*, which appeared in 1997.

A second and even more relevant aspect which deserves to be pointed out: the solid and constant reference to Anna Maria Bernardinis's lessons and her peculiar approach to the epistemological question in the context of children's literature. A reference which came of a deep theoretical, anthropological and religious consonance, the result of a common identification in the principles of the Christian faith and the values of a personalist pedagogy.

In other words, there was the common religious and spiritual nature and the vigorous battle sustained by Giuseppe Flores d'Arcais's pupil in favour of an approach to pedagogical and educational problems and the universe of reading and its protagonists, which was strongly connoted in a personalist way, in the real choice autonomously and consciously made by Renata Lollo in assuming Anna Maria Bernardinis as her cultural and scientific reference point, that is, electing her as her 'teacher' of pedagogical and literary studies for children¹⁶.

Then, it is well understood the emphasis already given by Renata Lollo in the 1997 entry *Letteratura giovanile* about some cornerstones of the interpretation of this discipline offered by the Paduan scholar. Not surprisingly, Renata Lollo repeatedly referred to the question of the denomination of this discipline – *children's literature* or *youth literature*, etc. –, which became the subject of many discussions, of which Anna Maria Bernardinis had widely demonstrated how it assumed a real «categorical significance» beyond a banal nominalism to

¹³ R. Lollo, *Letteratura giovanile*, in J.M. PELLEZO, C. Nanni, G. Malizia, *Dizionario di scienze dell'educazione*, Turin, LAS, 1997, pp. 603-605; *Idem*, a revised and updated second edition, Turin, LAS, 2008, pp. 670-671.

¹⁴ R. Lollo, *Lo spazio del leggere come crocevia di relazioni: cenni interpretativi*, «*Studium Educationis*», vol. V, n. 3, 2000, pp. 419-428.

¹⁵ R. Lollo, *La letteratura per l'infanzia tra questioni epistemologiche e istanze educative*, in A. Ascenzi, *La letteratura per l'infanzia oggi. Questioni epistemologiche, metodologie d'indagine e prospettive di ricerca*, Milan, Vita e Pensiero, 2002, pp. 37-68.

¹⁶ See A.M. Bernardinis, *Per una ricerca pedagogica sulla letteratura giovanile*, in G. Flores d'Arcais, *La ricerca pedagogica*, Bari, Laterza, 1964, pp. 97-102; and *Ead.*, *Narrazione e pedagogia*, in G. Flores d'Arcais, *Pedagogie personalistiche e/o pedagogia della persona*, *Colloquio interuniversitario*, Brescia, La Scuola, 1999, pp. 22-29.

the extent that it ended up referring to the nature and features of reading, which was identified as an educational tool imposed from outside or an authentic experience during the various steps in the years of personal growth every time, as she pointed out¹⁷. As it will be seen, this is a topic, which Renata Lollo would have taken up in the following works with equal emphasis, but with a greater analytical depth and a wide range of references.

Furthermore, in the light of the evolution recorded by *youth literature* over the last two centuries, Renata Lollo also examined «the difficulty to define and to theoretically investigate this discipline» in the text published in 1997. Anna Maria Bernardinis's studies also guided her analysis in this field¹⁸, as evidenced by the Milanese scholar's assumption of a highly problematic assessment of most of the authors and the works for youth literature in the nineteenth century.

Renata Lollo specified: – In the nineteenth century, in addition to a few great masterpieces, writing *for* children in Italy was particularly characterized by an intentional pedagogy of both Manzoni's Catholic-liberal matrix and Mazzini's orientation, with a consequent instrumentality of linguistic-narrative structures for the extra-literary purpose of an education, which was not very inclined to develop youth autonomy.

The scholar noted that only in recent times the emphasis was shifted «to the pleasure of reading, a 'pedagogy of reading' which tends to make one acquire the taste for a personal relationship with books before their (possible) critical study. There is no doubt that these goals respond to the recipients' needs and the adult propositional modality precisely changes with respect to this nineteenth-century pedagogy»¹⁹.

According to Lollo, a personalist pedagogy of reading could freely intervene in this new scenario and had the promotion of what Anna Maria Bernardinis had defined an «equal dialogue between author and reader»²⁰ as a priority and undoubtedly important goal.

In fact, Renata Lollo noted in a different way that «the problematic knot underlying youth literature is once again proposed: youth autonomy and choice are inseparable from adult proposals and choices, among which the production of texts is particularly important and more it is from an adult origin, more less young is the recipient. Youth literature cannot pretend to ignore that there is not only a disparity of skills between author and reader, but a deeper disparity to which the name of generational could be given».

¹⁷ A.M. Bernardinis, *Pedagogia della letteratura giovanile*, Padua, Liviana, 1971; Ead., *Filosofia e pedagogia del leggere, persone e personaggi della lettura giovanile*, Pisa, Istituti editoriali e poligrafici internazionali, 1998.

¹⁸ In particular, the above-mentioned encyclopedia entry *Letteratura giovanile*, published by A.M. Bernardinis in *L'Enciclopedia pedagogica*, edited by Mauro Laeng.

¹⁹ Lollo, *Letteratura giovanile*, cit., pp. 603-604.

²⁰ Bernardinis, *Letteratura giovanile*, cit., c. 6726.

However, the scholar from the Catholic University of Milan clarified that it is also true «the writer, who is also an adult, formalizes the problem, he or she is the bearer of, through writing, in order to offer it to the pleasure and the excavation of a young reader who ultimately asks him/her to be himself/herself in his/her work and in the creative outcome in which it is available, in order to be able to freely know each other. Therefore, its equality is realized in a diversity of exchange».

Once again, on the basis of Anna Maria Bernardinis's personalist pedagogical lessons, Renata Lollo concluded that writing «becomes the space for a common increase in humanity in different ways»²¹.

As already mentioned, in 2000 Renata Lollo took up the epistemological question with the contribution with the title *Lo spazio del leggere come crocevia di relazioni*, published in the Paduan magazine «Studium Educationis». After a learned and detailed analysis of the meanings of reading and its implications at a cultural and anthropological level, carried out in the wake of the studies by J. Rifkin, V. Forrester, J. Maritain and P. Ricoeur, the scholar from the Catholic University of Milan now examined the connection between literature and pedagogy as a specific – and fundamental – connotation for *children's literature*.

In the wake of these results, Renata Lollo recovered and made her own the new definition of the pedagogical theory proposed by Anna Maria Bernardinis at the time, according to which pedagogy should have been considered as a knowledge «which tends to verify the theoretical and practical chance [of] free educational action [...]. It follows that pedagogy cannot be proposed in concluded and definitive ways in order to guarantee the autonomy of the learner (and, consequently, also the educator who establishes their dialogue or interprets the situations). Therefore, pedagogy is a *dialectical* (proposal of knowledge) and *rhetorical* speech at the same time, because *knowledge* and *argumentation* must be able to convince in improving action, considering people's freedom intangible, even both it is a natural person or a different proposal or interpretation». The Paduan scholar concluded that education is «like a dynamic process involving people's integrity and continuity towards purposes of improvement and existential completeness»²².

From this conception of educational process «as a planning and free assumption of responsibility towards oneself in any relationships», Renata Lollo derived a specific 'pedagogy of reading' lying the fundamentals of *children's literature*, which had to be considered as a space where educational and literary projects are legitimized and supported only within a relationship between two distinct individuals as a recognition of both literary and educational intentionality of the other than oneself at the same time²³.

²¹ Lollo, *Letteratura giovanile*, cit., pp. 604-605.

²² Bernardinis, *Narrazione e pedagogia*, cit., pp. 22-23.

²³ Lollo, *Lo spazio del leggere come crocevia di relazioni: cenni interpretativi*, cit., pp. 424-426.

In order to confirm the derivation of this conception of *children's literature* from the personalist pedagogy developed by Anna Maria Bernardinis, Renata Lollo underlined the role which should have been recognized to the Paduan scholar as the creator of a real theoretical and epistemological foundation of this discipline. On this regard, in the last part of her dense article published in «*Studium Educationis*», she wrote: – «A.M. Bernardinis's research frees theoretical dimension from uncertainties and delays» and contributes to provide an image of *children's literature* as a space for «humanly possible choices» and a place where «the styles and the values of a dialogue between man and man» are realized²⁴.

As already mentioned, the reflection of the scholar from the Catholic University of Milan on the nature and the features of this discipline recorded a last important achievement in the essay *La letteratura per l'infanzia tra questioni epistemologiche e istanze educative*, which appeared in 2002²⁵. After having taken up the topics she had previously illustrated in it, Renata Lollo only focused her attention on an apparently secondary and marginal aspect of this discipline, that is, its denomination, on the basis of the argumentations and the original theses previously formulated by Anna Maria Bernardinis²⁶.

On this regard, Renata Lollo stressed how there was not only a trivial nominalist option, generated from the predilection for the use of one or the other expression in different cultural areas and in various historical phases at the basis of the choice to define this discipline with the title of *children's literature* or the – only apparently similar or equivalent – one of *youth literature*, but there were theoretical and epistemological reasons and needs, which only a naive and inevitably superficial approach could misunderstand and underestimate.

In fact, according to the Milanese scholar, who was contrary to the semantic static nature and poverty of the term *children's literature*, the denomination *youth literature* had a dynamism, which was able to problematically invest both the reader and the subject of reading, since it is precisely the *youth* quality of the reader which defines the *corpus* of literary works concerning him/her through his/her choices.

On this regard, in the wake of Anna Maria Bernardinis's studies, Renata Lollo specified: «Therefore, the 'categorical significance' of *youth* [...] probably lies in the theoretical liberation of a person's specific potential for development and growth. [...] Thus, *youth* would like to mean the person's openness to questions, relationships, curiosity, willingness to change and to question oneself and the need to be and to live in a fully human way».

²⁴ *Ibid.*, pp. 427-428.

²⁵ Lollo, *La letteratura per l'infanzia tra questioni epistemologiche e istanze educative*, cit., pp. 37-68.

²⁶ See Bernardinis, *Pedagogia della letteratura giovanile*, cit., pp. 46-52. But also see the above-mentioned Ead., *Letteratura giovanile*, cit., cc. 6717-6732.

And she added: «*Youth*, mind you, and not only *young*: to better guide towards understanding a condition of the spirit for an integral openness to fulfil and to look for a meaning which starts from a generational datum (being *young*), but it does not reduce to it and invests all the life. [...] Thus, the young person, in whom a demand for growth develops and who believes he/she can (also) seek answers in books appears in his/her *centrality* as the subject of an educational project, which is due to him/her: the project to live and to grow up in horizons which are bearers of meaning. This has the identification of relational networks, the assumption of moral rules (of living), before the social ones, the specification of courses where to realize one's identity and citizenship with personal responsibility and in respect for other human beings, in addition to all the necessary and understandable distinctions, as a consequence»²⁷.

In other words, – and this is the central nucleus of Renata Lollo's epistemological reflection – the purposely defined *children's literature* hides a static and inevitably passive point of view of the educational process activated by reading practices, while the term *youth literature* postulates a sort of centrality and autonomy of the reader, as the educational planning concerning him/her cannot ignore – and indeed intrinsically depends – on his/her individuality and inner specificity and it is his/her lasting and continuous development.

The scholar from the Catholic University of Milan concluded: - Now, the relationship between the most careful questions of a personalist pedagogy and the literary identity, which has always affirmed its intrinsic freedom from external conditioning, seems to get outcomes which go beyond the reflection on the literature linked to the years of growth for fidelity to the interior form of which it must make mention. *Youth literature* appears to be in some respects [...] what is chosen every time with inner freedom, curiosity of discovery, ability to question oneself and will to learn, whatever the age of the reader. [...] But, on the other hand, the extension does not detract from the fact that the years of growth are the centre of theoretical research relating to the relationship with literature²⁸.

In addition to the theoretical richness of this position (clearly inspired by the pedagogical personalism of the Paduan school), I am personally convinced that Renata Lollo fully grasped even the strong risks in a conception of *literature for children* or *young people* which inexorably ended up losing the time span defining it at an identity level and, consequently, the peculiar evolutionary characterization of its recipients, which prevented its inexorable dissolution in the *mare magnum* of the literature *tout court*, reducing it to a sort of simulacrum of a reassuring and consoling personalist *pedagogy of reading*.

Perhaps it is precisely for this reason – but mine is just a simple hypothesis in the absence of sources which prove it beyond any reasonable doubts – that since 2002 Renata Lollo has abandoned research related to the epistemology

²⁷ Lollo, *La letteratura per l'infanzia tra questioni epistemologiche e istanze educative*, cit., pp. 58-63.

²⁸ *Ibid.*, pp. 64-66.

of this discipline to focus her attention on the historical dimension and the examination of the genesis and the developments of a knowledge which precisely found its deepest meaning and its most authentic legitimacy in the historical dimension and its historically determined intertwining with training cultural processes – beyond the contingent names of *children's literature* or *youth literature*, or even *literature for young people* –.

It is no coincidence that a year later, in 2003, Renata Lollo published the essay *Sulla letteratura per l'infanzia* for the printing house La Scuola di Brescia, where epistemological dimension was completely marginal, while a central space assumed the historical reinterpretation of what she indicated as «a deeply simple knowledge and, therefore, it was so difficult to define what she calls children's literature»²⁹.

²⁹ R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 2003, p. 5 (*Premise*).

Gli archivi scolastici come fonti per la ricerca storico-educativa: esperienze e prospettive*

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School archives as source for historical-educational research: experiences and perspectives

ABSTRACT: This paper outlines the main historiographical reasons behind the birth of school archives, which, although often neglected and ignored, represent new pivotal sources for the history of education. With reference to the legislation on this topic, some pioneering experiences regarding the census and recovery of school archives in Emilia Romagna (Italy) are presented, with special attention to the city of Bologna (Italy). Moreover, this contribution sets out to promote the safeguarding of this remarkable educational heritage, which is essential not only for researchers and the history of education, but also for teaching and citizenship.

EET/TEE KEYWORDS: School archives; Material school culture; Educational heritage; Collective memory; Italy.

1. *Scenari e contesti*

Gli ultimi decenni della storia della scuola sono stati caratterizzati dal netto superamento delle ricostruzioni di sintesi storico-politica su fonti legislative o

* Il presente testo costituisce un ampliamento e rielaborazione della relazione *Gli archivi scolastici di Bologna e dell'Emilia Romagna* presentata al Convegno nazionale di Matera dal titolo *La memoria e le carte. Gli archivi e la valorizzazione del patrimonio storico-educativo* il 4-5 ottobre 2019, organizzato dall'Università degli Studi della Basilicata unitamente alla Deputazione Lucana di Storia Patria con il patrocinio della Società Italiana per lo Studio del Patrimonio Storico Educativo (SIPSE) sorta nel 2017 di cui al link <<http://www.sipse.eu>> (ultimo accesso: 05.01.2021). Si ringraziano i funzionari degli archivi qui citati per il supporto nella ricerca dei dati.

storico-pedagogiche, con l'emergere di nuove domande storiografiche, legate alla necessità di superare la consueta storia 'legale' della scuola per conoscere invece la scuola 'reale', la 'cultura scolastica' e la 'scatola nera della scuola'¹. Si è trattato di una lenta rivoluzione storiografica che, a partire dagli anni Ottanta, anche a livello internazionale, ha posto quindi nuovi interrogativi e cercato nuove fonti nella cultura materiale della scuola (libri di testo, quaderni, outillage scolastico etc.), attraverso le quali i docenti hanno declinato le materie scolastiche nella pratica didattica quotidiana. Cruciale è stato il ruolo svolto dalla storia locale della scuola che, con la focalizzazione dello sguardo su un limitato territorio o caso di studio, ha permesso di individuare le fonti utili per la ricostruzione della cultura scolastica e della progettualità agita sulla scuola 'dal basso', con i suoi attori che riemergono come personaggi vivi sulla scena, quasi tolti dall'oblio del tempo e dello spazio sociale, come i docenti, i direttori, gli alunni, le famiglie, le autorità, la più ampia società², anche se non sempre è possibile cogliere lo svolgimento della vita quotidiana e materiale della scuola, con i suoi ritmi, le sue gerarchie, i suoi ruoli e il complesso congegno organizzativo, pedagogico e didattico che ne caratterizza lo svolgimento tra progettualità e attuazione. A queste esigenze storiografiche rispondono, anche, le fonti presenti negli archivi scolastici, che conservano la documentazione amministrativa delle scuole (registri di protocollo, contabilità, inventari, corrispondenza, circolari, verbali di riunioni, fascicoli del personale etc.) e quella relativa all'attività didattica (registri di classe e del docente, registri delle assenze, registri dei certificati scolastici, verbali degli esami, pagelle, relazioni dei docenti, elaborati degli studenti, la cartellonistica didattica, documentazione fotografica e audiovisiva etc.). Si tratta di un insieme di carte che possono restituire – al

¹ 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*, «Paedagogica Historica. Supplementary series», vol. I, 1995, pp. 353-382 poi D. Julia, *Riflessioni sulla recente storiografia dell'educazione in Europa: per una storia comparata delle culture scolastiche*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 3, 1996, pp. 119-147; M. Lawn, I. Grosvenor, *Materialities of schooling. Design, technology, objects, routines*, Oxford, Symposium Books, 2005; A. Escolano Benito (ed.), *La cultura material de la escuela. En el centenario de la Junta para Ampliación de Estudios, 1907-2007*, Berlanga De Duero, Centro Internacional de la Cultura Escolar (CEINCE), 2007; S. Braster, I. Grosvenor, M. Del Mar Del Pozo Andrés, *The Black Box of Schooling. A cultural history of the classroom*, Brussels, P. I. E. Peter Lang, 2011; J. Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016. Cfr. R. Sani, *History of Education in Modern and Contemporary Europe: New Sources and Lines of Research*, «History of Education Quarterly», vol. LIII, n. 2, 2013, pp. 184-195.

² M. D'Ascenzo, *Linee di ricerca della storiografia scolastica in Italia: la storia locale*, «Espacio, Tiempo y Educación», vol. 3, n. 1, 2016, pp. 249-272; Ead., *The impact of the local dimension on the history of teaching profession in Italy. Il contributo della dimensione locale alla storia della professione docente in Italia*, «Rivista di storia dell'educazione», vol. 1, 2018, pp. 153-171; A. Barausse, C. Ghizzoni, J. Meda, *Editoriale. «Il campanile scolastico». Ripensando la dimensione locale nella ricerca storico-educativa*, «Rivista di storia dell'educazione», vol. 5, n. 1, 2018, pp. 7-14.

di là di una certa ripetitività – informazioni uniche sul funzionamento della singola scuola e sulla cultura scolastica prodotta in un determinato luogo e territorio; sono carte certamente uniche e irripetibili, tuttavia anche simili a quelle di altre scuole, in uno scorrere comune del tempo nel calendario scolastico e nella vita quotidiana e per questo utili poi per cogliere analogie e differenze sulle pratiche educative e sull'organizzazione della scuola *tout court*. Inoltre, la documentazione raccolta e conservata negli archivi scolastici può restituire elementi utili per la conoscenza del contesto istituzionale di azione concreta dei soggetti della scuola e, contemporaneamente, del funzionamento interno dell'istituzione scolastica e del rapporto tra scuola, comunità locale e nazionale e gli eventi politici più generali, ampliando lo sguardo dalla scuola alla storia sociale. Per questo, sul piano storiografico, gli archivi scolastici diventano fonti importantissime da censire, studiare e valorizzare, poiché la loro documentazione potrebbe permettere – su tempi lunghi ovviamente – di rivedere la stessa narrazione della storia della scuola italiana, più verosimile appunto attraverso una storia delle sue singole scuole³. In tale direzione, attiva di recente anche a livello internazionale⁴, si sono mossi i primi censimenti e studi sugli archivi scolastici dagli anni Novanta, condotti dalle sovrintendenze archivistiche, archivi di stato, enti locali, istituti per la Resistenza, storici della scuola e dalle stesse istituzioni scolastiche, con motivazioni anche diverse⁵,

³ E. De Fort, *Storie di scuole, storia della scuola: sviluppi e tendenze della storiografia*, in M.T. Segà (ed.), *La storia fa la scuola. Gli archivi scolastici per la ricerca e la didattica*, Portogruaro, Nuova Dimensione, 2002, pp. 31-70.

⁴ M. João Mogarro, *Arquivos e educação a construção da memória educativa*, «Revista brasileira de História da educação», n. 10 jul./dez. 2005, pp. 75-99; S. Geladaki, P. Papadimitriou, *School archives and their potentials in teaching: aspects of Greek reality*, «Journal of integrated information», 2014, <<http://ejournals.uniwa.gr/index.php/JIIM/article/view/3163>> (ultimo accesso: 04.01.2021); L. Paciaroni, *Archivos escolares: un recurso para la explotación didáctica del patrimonio cultural de las escuelas en Italia*, «Quadernos chilenos de historia de la educación», n. 12, 2019, pp. 9-24; R. Esteban Sandoval Díaz, *Archivos escolares que construyen identidad: el liceo público, historia y patrimonio de los chilenos*, «RIDPHE. Revista iberoamericana do Patrimônio Histórico-Educativo», vol. 2, n. 2, jan./jun. 2016, pp. 22-36; R. Brião de Castro, *O arquivo da Escola «Garibaldi» na região colonial de Pelotas (Brasil): entre documentos e preservação*, in A. Barausse, T. de Freitas Ermel, V. Viola (edd.), *Prospettive incrociate sul Patrimonio Storico Educativo*. Atti dell'incontro Internazionale di Studi di Campobasso 2/3 maggio 2018, Brescia-Lecce, Pensa Multimedia, 2020, pp. 341-359; *Prima Jornada de arquivos escolares*, 17 settembre 2020 al link <<https://www.rosario-conicet.gov.ar/ver-agenda/item/1361-irice-programa-huellas-de-la-escuela>> (ultimo accesso: 02.01.2021).

⁵ Sulle operazioni di censimento degli archivi scolastici la bibliografia è ormai vasta, si rinvia almeno a G. Tato (ed.), *La lavagna nera. Le fonti per la storia dell'istruzione nel Friuli Venezia Giulia. Atti del convegno (Trieste-Udine, 24-26 novembre 1995)*, Trieste, Associazione Nazionale Archivistica Italiana – Sezione Friuli Venezia Giulia, 1996; Q. Antonelli (ed.), *Guida agli archivi scolastici di Rovereto*, Rovereto, Comune di Rovereto, 1997; S. Soldani, *Andar per scuole: archivi da conoscere, archivi da salvare*, «Passato e Presente», n. 42, 1997, pp. 137-150; F. Cavazzana Romanelli, D. Martino (ed.), *Gli archivi delle scuole. Atti del corso di aggiornamento (Treviso, 7-15 giugno 1995)*, Treviso, Archivio di Stato di Treviso - Provveditorato agli Studi di Treviso, 1997; F. Klein, *Sui consumati banchi... Generazioni cultura e istituzioni educative negli archivi*

tramite ricerche svolte anche in occasione di anniversari di fondazione o dei festeggiamenti del centocinquantenario dell'Unità d'Italia, intrecciando spesso l'attività didattica nelle classi per la ricerca sugli archivi e sulla memoria della propria scuola⁶. Censimenti, attività didattiche, studi di caso si sono svolti

e nelle biblioteche delle scuole fiorentine. *Atti del convegno (Firenze, 28 marzo 1996)*, «Archivi per la storia», vol. X, n. 2, 1997; R.G. Arcaini, *Gli archivi delle scuole elementari trentine: censimento descrittivo*, Trento, Provincia autonoma di Trento, Servizio beni librari e archivistici, 2003; Istituto romano per la storia d'Italia dal fascismo alla Resistenza (ed.), *Memorie di scuola: indagine sul patrimonio archivistico delle scuole di Roma e provincia*, Milano, FrancoAngeli, 2006; A. Nicosia (ed.), *Dagli archivi delle scuole romane: storia, memoria, identità. Catalogo della mostra presentata al Vittoriano (Roma, 13 maggio-11 giugno 2006)*, Roma, Gangemi, 2006; L. Vaccarotti, *L'archivio scolastico del circolo didattico di Vetralla*, Vetralla, Quaderni di Vetralla 7, Davide Ghaleb editore, 2009; sugli aspetti metodologici F. Klein, *La storia dell'educazione e le fonti: gli archivi scolastici*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 5, 1998, pp. 37-44; G. Fioravanti, *Gli archivi delle scuole: aspetti istituzionali, normativa vigente e funzioni di soggetti istituzionali*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 6, 1999, pp. 337-344; G. Giarrizzo, M. Giarrizzo, *Per una storia d'Italia come storia delle sue scuole. Una scuola di frontiera, la «Manzoni» di Catania*, Catania, Maimone, 2005; M. Ferrari, M. Morandi (edd.), *Documenti della scuola tra passato e presente. Problemi ed esperienze di ricerca per un'analisi tipologica delle fonti*, Azzano San Paolo (BG), Junior, 2007; M. Ferrari, G. Panizza, M. Morandi (edd.), *I beni culturali della scuola: conservazione e valorizzazione*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 15, 2008; J. Meda, *La conservazione del patrimonio storico-educativo: il caso italiano*, in A. Badanelli, J. Meda (edd.), *La historia de la cultura escolar en Italia y en España: balance y perspectivas*, Macerata, eum, 2013, pp. 167-198; G. Simone, F. Targhetta, *Sui banchi di scuola tra fascismo e Resistenza. Gli archivi scolastici padovani (1938-1945)*, Padova, Padova University Press, 2016. Ulteriori riferimenti in M. D'Alessio, *Life at school: class registers as a new source of studying historical and educational heritage*, in *Atti della IV Jornadas Científicas de la Sociedad Española para el Estudio del Patrimonio Histórico Educativo (Sephe)*, 2014, pp. 401-409; L. Paciaroni, *School archives: a resource for historical-educational research and schools*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 799-807; M. D'Alessio, *La memoria e le carte. Gli archivi e la valorizzazione del patrimonio storico-educativo. A proposito del recente Convegno nazionale di studi di Matera (4-5 ottobre 2019)*, «History of Education & Children's Literature», vol. XV, n. 1, 2020, pp. 791-807; B. Serpe, *Gli archivi scolastici, la promozione e la valorizzazione del patrimonio storico-educativo in Calabria*, in A. Ascenzi, C. Covato, J. Meda (edd.), *La pratica educativa. Storia, memoria e patrimonio*, Macerata, eum, 2020, pp. 105-115; Idd., *Gli Archivi scolastici in Calabria: contenitori di memoria*, in Barausse, de Freitas Ermel, Viola (edd.), *Prospettive incrociate sul Patrimonio Storico Educativo*, cit., pp. 329-339.

Si segnala l'importante lavoro di recupero e valorizzazione svolto dal Forum delle Scuole storiche napoletane al link <<http://www.forumschoolstorichenapoletane.it/chi-siamo/il-progetto/>> (ultimo accesso: 03.01.2021).

⁶ M.L. Perna, *Tra vecchie carte. Esperienze didattiche negli archivi di scuole torinesi*, Torino, Consorzio di scuole per gli archivi scolastici – Istituto piemontese per la storia della Resistenza e della società contemporanea, 2002; Sega, *La storia fa la scuola. Gli archivi scolastici per la ricerca e la didattica*, cit.; A. Santagiustina, R. Vivante, *Fare storia in archivio*, «Cooperazione Educativa», n. 1, 2003, pp. 58-61; E. Cento, L. Di Ruscio, *Didattica della storia dell'800 e del '900. Un modello per la fruizione e la valorizzazione delle fonti documentarie*, Corazzano, Titivillus Edizioni, 2005; D. Picciau, L.M. Plaisant (edd.), *L'archivio scolastico. Storia e didattica*, Cagliari, CUEC, 2005; P. Angelucci, *Gli archivi scolastici: dall'interesse storiografico all'uso didattico*, in M. Locci, S. Maroni, *Tutti in classe!: la scuola in Umbria dall'Unità ad oggi nei documenti degli archivi scolastici: catalogo della mostra documentaria del Progetto Hermes per*

contemporaneamente al dispiegarsi di una complessa normativa nazionale che, a partire proprio dagli anni Novanta, ha contribuito a definire le competenze relative agli archivi scolastici. In particolare, le leggi sull'autonomia scolastica introdotte dall'art. 21 della legge n. 59 del 15 marzo 1997 (nota come legge 'Bassanini') e il successivo D.P.R. n. 275 dell'8 marzo 1999 hanno attribuito personalità giuridica alle istituzioni scolastiche, divenute quindi ente pubblico (a partire dal 1 gennaio 2001) sotto la responsabilità dei dirigenti scolastici, obbligate pertanto a riordinare i propri archivi e a redigere un inventario degli archivi storici costituiti dai documenti relativi agli ultimi quaranta anni, in base all'art. 40 del D.Lg. 29 ottobre 1999 n. 490. Il Legislatore ha poi precisato tale responsabilità con il Codice dei beni culturali e del paesaggio (D. lgs 22 gennaio 2004 n. 42) che sottopone anche gli archivi scolastici, come enti pubblici, alla tutela e vigilanza della Soprintendenza archivistica territoriale. Le successive Linee guida per gli archivi delle istituzioni scolastiche emanate dal Ministero per i Beni e le Attività Culturali - MIBACT hanno poi fornito alle scuole le informazioni necessarie per poter conservare in maniera adeguata il proprio patrimonio, con obbligo di depositarlo nell'Archivio di Stato competente del territorio in caso di impossibilità, al fine di salvaguardare in maniera sicura gli archivi scolastici poiché essi

conservano la memoria dell'attività didattica nelle sue più specifiche articolazioni ed al contempo consentono di ricostruire la storia culturale e sociale dell'istruzione pubblica italiana sia in ambito locale sia nazionale⁷.

La presenza di chiare indicazioni di legge non è ad oggi ancora sufficiente, tuttavia, a salvare gli archivi scolastici dalle condizioni di fragilità in cui si trovano, spesso conservati in scantinati o soffitte, sommersi dalla polvere, dall'umidità, soggetti ad allagamenti o a scarti incontrollati per mancanza di spazi e di risorse adeguate al recupero, riordino, conservazione e ordinamento. Le istituzioni scolastiche, del resto, sono spesso in sofferenza per la tutela e gestione dei propri archivi sia per motivi logistici legati agli spazi insufficienti sia per motivi organizzativi, dovuti all'assenza di figure professionali, interne alla

la valorizzazione degli archivi scolastici, s.l., Soprintendenza Archivistica per l'Umbria, Città di Castello, Alfagrafica, 2010, pp. 45-56; P. Angelucci, S. Martella, *Gli archivi scolastici: solo vecchie carte? Alla scoperta di una memoria trascurata*, Perugia, Morlacchi, 2008; L. Lajolo, *Scuola e società: archivi scolastici e ricerca didattica*, Asti, s.l., s.n., 2005; F. Cavazzana Romanelli, E. Perillo, *Fra scuola e archivi. Storia e prospettive di una lunga complicità*, «Storia e futuro», n. 36, novembre 2014, <<http://storiaefuturo.eu/fra-scuola-e-archivi-storia-e-prospettive-di-una-lunga-complicita>> (ultimo accesso: 12.01.2021); G. Fogliardi, G. Marcadella, *Gli archivi ispirano la scuola. Fonti d'archivio per la didattica. Terza giornata di studio per la valorizzazione del patrimonio archivistico del Trentino-Alto Adige* (Trento, 21 novembre 2008), Roma, Ministero per i Beni e le Attività culturali, Direzione generale per gli archivi, 2010.

⁷ *Linee guida per gli archivi delle istituzioni scolastiche*, <<http://www.archivi.beniculturali.it/index.php/cosa-facciamo/progetti-di-tutela/progetti-conclusi/item/556-archivi-delle-scuole>> (ultimo accesso: 03.01.2021).

scuola, adeguatamente preparate alle funzioni di riordino e documentazione della storia e memoria della scuola stessa. Le stesse istituzioni preposte alla tutela degli archivi scolastici, d'altra parte, soffrono di una progressiva riduzione di personale tecnico interno, elemento che impedisce di proseguire in quei sopralluoghi capillari necessari per verificare le condizioni degli archivi scolastici ma anche, a volte, per conoscerne la stessa dislocazione sul territorio. Non giova neppure, probabilmente, l'assenza di coordinamento dei diversi soggetti istituzionali a vario titolo interessati agli archivi scolastici, che spaziano dalle sovrintendenze archivistiche ai singoli archivi di stato, dagli istituti di storia contemporanea agli archivi comunali, da enti legati alle regioni alle istituzioni scolastiche, ciascuno con la propria mission peculiare e livello di attenzione e approfondimento. In molti casi tali enti hanno solo in parte provveduto a pubblicare le proprie iniziative o a inserire censimenti e inventari negli appositi siti istituzionali, rendendo ardua una mappatura completa sui territori, elemento che aumenta il rischio di dispersione. Manca inoltre una consapevolezza culturale diffusa nell'opinione pubblica, talvolta anche nel mondo politico, dell'importanza del patrimonio racchiuso negli archivi scolastici per la memoria collettiva, nonostante i numerosi contributi sul piano scientifico e didattico già noti, oltre ad alcuni interessanti volumi di carattere amatoriale o narrativo editi in funzione della memoria collettiva⁸.

⁸ F. Fusaro, *Maestri e balilla. Il ventennio fascista a Mercato San Severino attraverso le cronache scolastiche*, Salerno, ASIR, 1993; L. D'Ignazi, *Tra i banchi del passato: la storia vissuta dei bambini di ieri. Ricerca storica sui registri scolastici dell'archivio dell'Istituto Scolastico comprensivo di Ripatransone dal 1933 al 1946*, Grottammare, Media Print 2000, 2009; O. Marrocco (ed.), *La scuola della madia vuota: san Muro Cilento. Cronache scolastiche 1929-1944*, Acciaroli, Centro di promozione culturale per il Cilento, 2002; D. Gasparini (ed.), *I balilla a scuola: cronache, pensiero, dettati di bambini plagiati e contenti (Miane 1928-1943)*, Cison di Valmarino, Circolo culturale «Al Mazarol», 2003; A. Melandri, G. Fugattini, *Scolari, maestri e banchi di scuola: storia, aneddoti, curiosità e rivelazioni: la scuola di Fusignano e frazioni ricostruita attraverso i registri scolastici (1860-1952)*, Fusignano, Morandi, 2003; D. Gasparini (ed.), *Mi piace tanto le erbe cotte...: cronache, pensiero, dettati di bambini poveri e contenti (Miane, 1928-1947)*, Cison di Valmarino, Circolo culturale «Al Mazarol», 2004; A. Castrovilli, N. Del Vento, C. Seminara, *Scuole Gabelli e Pestalozzi: registri degli anni scolastici 1943-1945*, Torino, Tipografia Castello, 2005; G. Sgangero, *Storie e memorie: cronache, testimonianze, ricordi dai registri di classe della scuola «Duca d'Aosta» di Monfalcone (1930-1955)*, Monfalcone, Tip. Savorgnan, 2005; D. Corvino, *Schegge didattiche: memorie d'altri tempi. Cronache scolastiche dal 1939-'40 al 1944-'45 dei maestri di Castel San Giorgio e Siano*, Napoli, Guida, 2006; B. Sforza (ed.), *«Me paréa mill'anni...»: appunti e ricordi tratti dalle cronache della scuola di Vivaro Romano*, Subiaco, Ed. Fabreschi, 2007; F. Caggio, R. De Polo, A. Gottardi (edd.), *Maggio è un bel mese per la prima classe...: prime letture di antichi registri scolastici*, Milano-Udine, Mimesis, 2010; A. Mencarelli, *Racconti di scuola. Alunni e maestri a Costano nei registri di classe 1939-1989*, Quaderni del Museo della scuola di Castelnuovo di Assisi (2), Foligno, Il Formichiere, 2014; A. Del Zotto, *Insegnanti e alunni delle scuole elementari di Cordenons dall'anno scolastico 1945-1946 all'anno scolastico 1949-1950. Dati statistici, documenti fotografici e cronache della vita scolastica*, Pordenone, Universalia, 2016.

2. Mappare e censire per salvare gli archivi scolastici: esperienze in Emilia Romagna

Negli ultimi decenni l'Emilia Romagna è stata oggetto di attenzione, spesso anche congiunta, di enti diversi *in primis* la Soprintendenza archivistica ovviamente, ma anche gli istituti di storia contemporanea, gli archivi storico-comunali, gli archivi provinciali, gli archivi degli ex provveditorati agli studi che hanno promosso diverse attività di ricognizione, censimento, riordino degli archivi scolastici – anche in seguito al terremoto dell'Emilia nel 2012 – così come iniziative di valorizzazione didattica con/per le scuole, quali quelle presentate nelle manifestazioni *Quante storie nella storia* promosse dall'Istituto per i Beni Artistici Culturali e Naturali della Regione Emilia-Romagna (IBC), ente di recente confluito nel Patrimonio Culturale dell'Emilia Romagna. Particolarmente interessante è stata l'azione dell'Archivio di Stato di Piacenza che ha coordinato il censimento degli archivi scolastici tra 1998 e 2007, con l'elenco dei materiali d'archivio organizzato per tipologia, estremi cronologici, consistenza pubblicato sul sito⁹. Si tratta di un lavoro importante, caratterizzato anche da una sezione dedicata alla storia novecentesca dell'istruzione e dall'ospitalità di un 'Museo didattico e della didattica' che raccoglie sussidi didattici, come cartine geografiche, registratori, proiettori, vetrinette e altri strumenti, oltre al fondo bibliografico del pedagogista Daniele Novara, costituito da circa 300 testi scolastici per le scuole elementari e le scuole medie inferiori e superiori¹⁰.

Al 2007 risale un censimento degli archivi scolastici di Reggio Emilia promosso dall'Istituto Storico per la Resistenza e la Società contemporanea in provincia di Reggio Emilia-ISTORECO, dalla Provincia e dalla Soprintendenza archivistica locale, che definì il censimento sugli istituti scolastici primari e secondari istituiti prima del 1945. Un precensimento iniziale coinvolse l'Ufficio scolastico della provincia per informare dell'iniziativa e acquisire indicazioni sommarie del patrimonio presente. Grazie a finanziamenti acquisiti dalla Soprintendenza nel corso del 2009 si svolse poi il vero e proprio censimento di undici istituti superiori, cinque istituti comprensivi e quattro direzioni di circoli didattici preesistenti al 1945, con sopralluoghi mirati e inventari pubblicati sul sito dell'Archivio di Stato di Reggio Emilia¹¹.

⁹ <<http://www.archiviodistatopiacenza.beniculturali.it/index.php?it/227/archivi-scolastici>> (ultimo accesso: 04.01.2021).

¹⁰ E. Stendardi, *Il Museo didattico e della didattica dell'Archivio di Stato di Piacenza: un primo bilancio e prospettive per il futuro*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 15, 2008, pp. 137-140. Cfr. anche <<http://www.archiviodistatopiacenza.beniculturali.it/index.php?it/276/museo-didattico-e-della-didattica>> (ultimo accesso: 04.01.2021).

¹¹ B. Menghi Sartorio, S. Vitali, *Un primo censimento del patrimonio archivistico delle scuole reggiane*, in M. Carrattieri, N. Castagnetti, A. Ferraboschi (edd.), *Una provincia che fa scuola. Aspetti dell'istruzione secondaria a Reggio Emilia (1962-2012)*, Parma, Diabasis, 2014, pp. 327-354; si rinvia al link <<http://www.archiviodistatoreggioemilia.beniculturali.it/index.php?it/103/>>

La città di Modena è stata oggetto di uno specifico intervento sugli archivi cittadini da parte della Fondazione della Cassa di Risparmio locale dal 2007 con il progetto 'ArchiviaMo' che ha coinvolto il riordino degli archivi di numerose scuole, come il liceo scientifico statale 'Alessandro Tassoni', i cui inventari sono presenti nel sito dell'Istituto per i Beni Culturali e Naturali della Regione Emilia-Romagna (IBC)¹². Il progetto 'ArchiviaMo' ha previsto il riordino e inventario anche del prestigioso Istituto tecnico industriale statale 'Fermo Corni', che aveva già avviato il recupero del proprio patrimonio archivistico, con la collaborazione dell'Archivio storico comunale di Modena; ad un primo riordino era seguita una mostra e un importante volume e catalogo¹³. Anche il Liceo 'Carlo Sigonio', erede dell'antico Istituto magistrale cittadino, ha avviato in autonomia il recupero del proprio patrimonio archivistico e documentario, proseguendo l'attività anche tramite l'Associazione 'Amici del Sigonio' sorta nel 2013¹⁴. 'ArchiviaMo' ha curato anche il riordino e inventario di alcune scuole della provincia modenese come Castelvetro¹⁵ e dell'archivio storico del Comune di Carpi, che conserva fondi di natura scolastica comunale dal 1800 al 1922 e alcuni nuclei archivistici aggregati afferenti al locale ginnasio, all'Educandato delle Figlie del Gesù, all'asilo infantile, alla Scuola comunale di musica e alle scuole tecniche di avviamento professionale oltre al fondo della Direzione didattica (carteggi, registri di classe e di istituto, prove d'esame, verbali dei consigli di classe, graduatorie di concorsi di tutte le scuole) che facevano riferimento al Comune prima del 1968¹⁶.

fondi-archivistici> (ultimo accesso: 04.01.2021). Presso il Polo archivistico del Comune di Reggio Emilia si trova altresì collocato l'Archivio dell'Ispettorato scolastico della provincia di Reggio Emilia costituito da 52 buste (1919-1979).

¹² <http://archivi.ibc.regione.emilia-romagna.it/ibc-cms/cms.find?flagfind=customXdamsTree&id=IBCAS00226&munu_str=0_1_1&numDoc=69&docStart=&backward=&hierStatus=2,1,0&docCount=25&physDoc=4&comune=Modena> (ultimo accesso: 04.01.2021).

¹³ <<http://rivista.ibc.regione.emilia-romagna.it/xw-200703/xw-200703-a0044>> (ultimo accesso: 04.01.2021). Sulla storia del "Corni" cfr. O. Nuzzi (ed.), *Il Corni e Modena*, Modena, Corni Edizioni, 2003, specie pp. 121-126; F. Baldelli (ed.), *Dalla Regia Scuola Popolare Operaia per Arti e Mestieri all'Istituto tecnico industriale statale 'Corni'*, Modena, Mucchi, 2007. Si rinvia anche <https://www.istitutocorni.gov.it/pvw/app/MOIT0004/pvw_sito.php?sede_codice=MOIT0004&page=804812> e <<https://www.amicidelcorni.it/>> (ultimo accesso: 04.01.2021). Il Corni è attualmente sempre attivo nella conservazione della propria memoria, anche attraverso l'Associazione "Amici del Corni", che supporta le attività di restauro della collezione scientifica e tecnica dell'istituto stesso.

¹⁴ Sul "Sigonio" rinvio al sito <<https://www.sigonio.edu.it/presentazione/>> (ultimo accesso: 14.06.2019). Si segnala che sia l'"Associazione Amici del Corni" sia l'"Associazione Amici del Sigonio" sono di recente entrate a far parte della Società Italiana per lo Studio del Patrimonio Storico Educativo (SIPSE).

¹⁵ <http://archivi.ibc.regione.emilia-romagna.it/ibc-cms/cms.find?flagfind=customXdamsTree&id=IBCAS00117&munu_str=0_1_1&numDoc=7&docCount=25&docToggle=1&physDoc=1&comune=Castelvetro+di+Modena> (ultimo accesso: 04.01.2021).

¹⁶ L'Archivio storico del Comune di Carpi è particolarmente attivo nella didattica rivolta alle scuole ed alla cittadinanza, cfr. <<http://www.palazzodeipio.it/carpi/Sezione.jsp?idSezione=35>> (ultimo accesso: 09.01.2021).

Sempre la Soprintendenza archivistica dell'Emilia Romagna ha promosso nel 2016 lavori di censimento sugli archivi scolastici di Parma, che hanno portato alla luce il corposo patrimonio conservato nell'Istituto comprensivo 'Sanvitale-Fra Salimbene', in particolare di asili, scuole elementari e secondarie cittadine; altra attività di ricerca e riordino è stata svolta sul materiale dell'Istituto d'arte 'P. Toschi' e dal liceo classico cittadino 'G. Romagnosi' sul proprio archivio, come emerso in un convegno del 2019¹⁷. Non risultano invece attività di censimento degli archivi scolastici nella città di Ferrara, tuttavia alcune scuole secondarie di antica origine hanno lavorato sul riordino e valorizzazione didattica del proprio patrimonio documentario come il liceo 'Ludovico Ariosto', anche in relazione alla questione delle leggi antiebraiche¹⁸, e la scuola primaria 'Alda Costa', in stretta collaborazione con l'Archivio storico del Comune di Ferrara, il quale conserva il patrimonio di alcuni archivi di scuole cittadine, come peraltro anche l'Archivio di Stato¹⁹. Nell'Archivio di Stato di Forlì-Cesena sono conservati gli archivi di otto istituti scolastici di carattere storico di Forlì, come quello del liceo classico 'Giovanni Battista Morgagni', della Scuola media annessa all'Istituto statale d'arte, della scuola media 'Giovanni Pascoli', della Scuola normale poi Istituto magistrale 'Marzia Degli Ordelaffi', ma anche della Scuola normale femminile pareggiata di Faenza e molti altri²⁰, mentre in provincia di Forlì l'Istituto per i Beni Culturali e Naturali della Regione Emilia-Romagna (IBC) ha provveduto all'inventario della scuola elementare di Galeata²¹. Sempre in Romagna si segnala la presenza dei registri scolastici del Comune di Forlimpopoli tra 1859 e 1911 presso l'Archivio storico comunale²², mentre nell'Archivio di Stato di Ravenna si trovano invece gli archivi dell'Istituto tecnico commerciale statale 'Giuseppe Ginanni', con una documentazione compresa tra 1865 e

¹⁷ *Giornata di studi. Le scuole a Parma e i loro archivi. Una storia da scoprire*, Parma, 2 aprile 2019, organizzato dalla Soprintendenza archivistica e bibliografica dell'Emilia Romagna Liceo classico statale Gian Domenico Romagnosi Archivio di Stato di Parma, in <<http://www.sa-ero.archivi.beniculturali.it/index.php?id=1189>> (ultimo accesso: 04.01.2021; L. Bandini, D. Dagli Alberi (edd.), *LE CARTE DELLE ARTI. Il riordinamento dell'archivio dell'Istituto d'Arte "Paolo Toschi. Quaderni del Liceo n. 2*, Trento, Monte Università Parma Editore 2017.

¹⁸ R. Ansani, *I banchi vuoti. Il Liceo Ariosto e le leggi razziali del 1938*, Ferrara, Liceo Classico "Ariosto" 2004.

¹⁹ <<https://archibiblio.comune.fe.it/2044/presentazione-dell-archivio>> (ultimo accesso: 04.01.2021); *Una scuola per la città. Gli studenti in archivio per l'ottantesimo compleanno dell'Alda Costa*, Quaderni dell'Archivio storico-comunale di Ferrara, n. 2, Comune di Ferrara, 2014; Istituto comprensivo statale 'Alda Costa' di Ferrara, 1933-2013. *Ottant'anni di vita per la scuola Umberto I- Alda Costa. Catalogo della mostra fotografica*, Ferrara, Italtipolitografia, 2014.

²⁰ <<https://www.archivesportaleurope.net/directory/-/dir/content/IT-FC0137/fa>> (ultimo accesso: 04.01.2021).

²¹ <http://archivi.ibc.regione.emilia-romagna.it/ibc-cms/cms.find?flagfind=customXdamsTree&id=IBCAS00878&munu_str=0_1_1&numDoc=7&docCount=25&docToggle=1&physDoc=1&comune=Galeata> (ultimo accesso: 04.01.2021).

²² N.M. Liverani, *La scuola elementare a Forlimpopoli dalla legge Casati alla legge Credaro (1859-1911): inventario dei registri scolastici*, «Forlimpopoli: documenti e studi», vol. 8, 1997, pp. 177-203.

1995²³. Le esperienze di ricognizione e censimento svolte – qui solo brevemente richiamate – sono state possibili grazie allo sforzo enorme di numerosi enti – sotto lo sguardo ovviamente della Soprintendenza per specifica competenza – nonostante le difficoltà della progressiva carenza di mezzi e personale e questo rende sempre più difficile e complessa l'aggiornata ricognizione e successivo riordino e inventario di quegli archivi ad oggi ancora non noti e che giacciono negli scantinati o soffitte, ancora nascosti e non valorizzati.

3. Esperienze di censimento degli archivi scolastici di Bologna

Fin dalla metà degli anni Novanta la città e provincia di Bologna hanno posto grande attenzione al recupero e valorizzazione dei propri archivi scolastici, tramite diversi tipi di intervento sia dal basso degli istituti scolastici secondari più antichi e prestigiosi²⁴ sia da parte di altri soggetti istituzionali che hanno compiuto ricognizioni e attività di valorizzazione di tali fondi. Una prima importante rilevazione sugli archivi scolastici è stata svolta da dall'Archivio storico della provincia di Bologna sugli istituti comprensivi e gli istituti di istruzione secondaria. Tale indagine fu avviata nel 2007 in collaborazione con l'Ufficio Scolastico Provinciale, tramite l'invio di un questionario in cui erano richieste informazioni relative alla conservazione, gestione e consultabilità del patrimonio archivistico conservato dalle scuole. I risultati furono presentati all'interno del seminario *Gli archivi scolastici. Patrimoni culturali e risorse per la didattica* nel 2007 con grande ricchezza di dati e di prospettive²⁵ e il coinvolgimento della Soprintendenza archivistica dell'Emilia Romagna, della sezione regionale dell'Associazione nazionale archivistica italiana, dell'Istituto per i Beni Culturali e Naturali della Regione Emilia-Romagna (IBC), dell'Ufficio scolastico provinciale e dell'Istituto per la storia della resistenza e della società contemporanea nella provincia di Bologna (ISREBO)²⁶. Per quanto riguardava la conservazione, su 32 locali descritti solo undici erano idonei, inoltre era segnalata la carenza di impianti anti-intrusione e antincendio, la presenza di materiale estraneo all'archivio, rischi di degrado o di dispersione in 7 archivi e

²³ <https://sias.archivi.beniculturali.it/cgi-bin/pagina.pl?TipoPag=comparc&Chiave=492511&RicFrmRicSemplice=istituto%20tecnico&RicProgetto=as%20dravenna&RicVM=ricerca_semplice&RicSez=complessi> (ultimo accesso: 04.01.2021).

²⁴ Cfr. il recente *Il rumore del vuoto: assenze e presenze nell'Istituto magistrale «Laura Bassi» durante le leggi razziali*, Bologna, Regione Emilia Romagna Assemblée Legislativa, 2018.

²⁵ Il Seminario si svolse presso l'Istituto scolastico 'Crescenzi Pacinotti' il 18 aprile 2007, cfr. <https://www.cittametropolitana.bo.it/cultura/Istituti_e_Beni_culturali/Sistema_Archivistico/Progetti_12/Archivi_scolastici_1> (ultimo accesso: 04.01.2021).

²⁶ M.L. Bongiovanni, *Archivi scolastici: il 'Crescenzi-Pacinotti' di Bologna*, <<http://rivista.ibc.regione.emilia-romagna.it/xw-200703/xw-200703-a0045>> (ultimo accesso: 04.01.2021).

in 10 casi una parte dell'archivio era collocata presso altre scuole o presso locali esterni alla scuola.

A partire dal 2008 la città fu coinvolta in un'importante operazione culturale denominata 'Città per gli archivi'. Promosso dalla Fondazione del Monte di Bologna e Ravenna, il progetto coinvolse la Cassa di Risparmio di Bologna, la Soprintendenza archivistica dell'Emilia Romagna, l'Università di Bologna e l'Istituto per i Beni Artistici Culturali e Naturali della Regione Emilia-Romagna (IBC) per il riordino e inventariazione di alcuni importanti archivi cittadini e delle scuole secondarie e primarie²⁷. Tra questi si segnala il riordino e inventario dell'archivio scolastico del liceo ginnasio statale 'Luigi Galvani'. La documentazione rinvenuta, pur con alcune vistose lacune, in parte dovute a cambiamenti di sede e agli eventi delle guerre mondiali, raccoglie 486 buste e 858 registri per un arco temporale compreso tra la seconda metà del XIX secolo e il 2009. Si è trattato di un intervento di riordino molto significativo per un'aggiornata ricostruzione della storia del primo liceo classico nato in città, nel 1860, per decreto del luogotenente Luigi Carlo Farini; un liceo importante, luogo di formazione dei ceti dirigenti e di illustri docenti e studenti come – rispettivamente – Giosuè Carducci e Pier Paolo Pasolini²⁸. Il progetto 'Città per gli archivi' ha permesso il riordino e inventario dell'abbondante documentazione dell'archivio del liceo 'Augusto Righi', che fu il primo liceo scientifico istituito a seguito della Riforma Gentile nel 1923²⁹. Sul sito della Fondazione del Monte è pubblicata una mostra virtuale relativa all'esposizione documentaria allestita presso la biblioteca e il Museo di Scienze naturali del Liceo

²⁷ D. Camurri, *Il progetto "Una città per gli archivi"*, «Storia e Futuro. Rivista di storia e storiografia on-line», n. 17, giugno 2008, pp. 2-7 <www.storiaefuturo.com> (ultimo accesso: 04.01.2021); A. Antonelli (ed.), *Spigolature d'archivio. Contributi di archivistica e storia del progetto "Una città per gli archivi"*, Bologna, Bononia University Press, 2011 e in un numero monografico della rivista «Archivi & Computer», vol. XXII, n. 2, 2012; L. Giuva, M. Guercio, S. Vitali nella premessa di «Archivi & Computer», 2012, 2, pp. 5-6, mentre sulla connotazione territoriale del progetto si veda I. Pescini, *Città degli archivi, archivi territoriali: nuovi modelli di conservazione*, in L. Giuva, M. Guercio (edd.), *Archivistica. Teorie, metodi, pratiche*, Roma, Carocci, 2014, pp. 405-428; A. Antonelli, *L'esperienza del progetto "Una città per gli archivi": tra territorio e web*, in *Comunicare gli archivi nell'era di internet*, convegno organizzato dall'Associazione nazionale archivistica italiana – Anai e dall'Istituto centrale per gli archivi – ICAR (Roma, Archivio di Stato, mercoledì 16 marzo 2016), A. Antonelli, *L'esperienza archivistica del portale archIVI*, in *Il patrimonio culturale si svela: le biblioteche dell'università fra didattica, ricerca e nuove opportunità*, Atti della Tavola Rotonda (Ferrara, Salone Restauro-Musei, 22 marzo 2017), Ferrara, UnifePress, 2017. Più in generale si rinvia al sito <<https://www.cittadegliarchivi.it/contributes/document-1508145882>> (ultimo accesso: 04.01.2021).

²⁸ Archivio del Liceo ginnasio statale Luigi Galvani in <<https://www.cittadegliarchivi.it/fondi#contenuto>> (ultimo accesso: 04.01.2021); sul Liceo Galvani cfr. A. Campanelli, *Il Regio Liceo "Galvani" dal 1860 al 1865*, in *I cento anni del Liceo "Galvani" 1860-1960*, Bologna, Cappelli, 1961; M. D'Ascenzo, *The classical studies secondary school and the construction of national identity in post-unitary Italy*, «History of Education & Children's Literature», vol. VIII, n. 1 2013, pp. 523-536.

²⁹ <<https://www.cittadegliarchivi.it/pages/searchArchivi>> (ultimo accesso: 04.01.2021).

tra dicembre 2013 e febbraio 2014 in occasione del novantesimo anniversario di fondazione. La Mostra, dal titolo 'L'archivio svelato', presenta immagini di oggetti, prodotti didattici, fotografie e propone una ricostruzione della storia dell'istituto scolastico³⁰, peraltro presente anche all'interno dell'istituto stesso³¹. Il progetto 'Città per gli archivi' ha permesso anche l'inventariazione dell'Archivio dell'Istituto 'Aldini Valeriani - Sirani', sorto nel 1998 dalla fusione dei due storici istituti 'Aldini Valeriani' e 'Elisabetta Sirani', nati in tempi diversi ma destinati entrambi alla formazione professionale. La conservazione ordinata di questo ricchissimo materiale offre la possibilità di studiare, 'dal basso' della storia di una scuola, le vicende dell'istruzione tecnica e professionale in Italia, specie nella delicata fase degli anni Trenta e non solo³².

Particolarmente significativo appare il lavoro di riordino del complesso archivio dell'Istituto tecnico commerciale 'Pier Crescenzi'. Si tratta di uno dei più antichi istituti scolastici della città, luogo della formazione del ceto commerciale e impiegatizio, strettamente intrecciato con le vicende economiche e amministrative cittadine. La documentazione, dislocata in dodici stanze all'interno dell'edificio scolastico, è costituita da 2381 registri, 647 buste, 25844 fascicoli compresi tra 1865 e 2009. Essi raccontano la vita amministrativa interna all'istituto (corrispondenza, patrimonio, contabilità), ma anche l'attività didattica della docenza, degli esami, delle valutazioni e del rendimento scolastico³³. Al piano terra, la biblioteca contiene l'archivio storico del 'Pier Crescenzi' (con buste che risalgono al 1862) grazie a un primo intervento di riordino ed inventariazione. L'Istituto 'Pier Crescenzi' ha sempre studiato e conservato la propria memoria scolastica con grande attenzione, curando anche la pregevole collezione di 250 strumenti scientifici, in parte ideati dai due fisici Antonio Pacinotti e Augusto Righi, già docenti nell'Istituto, in cui svolsero le loro ricerche. Tale collezione è non solo ben conservata, ma anche visitabile dal vasto pubblico, espressione della sensibilità verso i temi della valorizzazione e divulgazione del proprio patrimonio scolastico da parte di questa secolare istituzione scolastica³⁴. Il Progetto 'Città per gli archivi' ha avuto il merito di

³⁰ <<https://www.cittadegliarchivi.it/mostrevirtuali/l-archivio-svelato>> (ultimo accesso: 04.01.2021).

³¹ L. Ciancabilla (ed.), *Liceo scientifico Augusto Righi novant'anni di storia*, Bologna, Minerva, 2013; cfr. <https://www.liceorighibologna.it/pvw/app/default/pvw_sito.php?sede_codice=BOLS0003&page=304912> (ultimo accesso: 04.01.2021).

³² I. Zanni Rosiello, *L'archivio della scuola professionale di arti e mestieri Aldini-Valeriani*, Bologna, Comune di Bologna, 1980; C. De Maria, *Gli istituti tecnici industriali tra fascismo e ricostruzione; il caso Aldini-Valeriani di Bologna*, in Antonelli (ed.), *Spigolature d'archivio. Contributi di archivistica e storia del progetto "Una città per gli archivi"*, cit., pp. 227-250.

³³ A.M. Brandinelli, V. Cinquini, F. Di Rosso, *Una scuola nel tempo. Documenti e collezioni dell'Istituto tecnico Pier Crescenzi*, Bologna, Grafis, 1995; M.L. Bongiovanni, *Archivi scolastici: il Crescenzi-Pacinotti di Bologna*, «IBC. Informazioni, commenti, inchieste sui beni culturali. Istituto per i beni artistici, culturali e naturali della Regione Emilia-Romagna», vol. 3, 2007, pp. 100-101.

³⁴ O. Bonora, F. Di Rosso (edd.), *I gabinetti scientifici dell'Istituto tecnico Pier Crescenzi di Bologna. Catalogo della biblioteca*, Bologna, Provincia di Bologna, 1996; V. Cinquini (ed.),

porre l'attenzione non solo sugli archivi degli istituti scolastici secondari (anche privati come l'Istituto S. Dorotea), ma anche su quelli delle scuole elementari cittadine. Un particolare lavoro di sistemazione è stato svolto sul patrimonio conservato nell'Istituto comprensivo 3 Lama di Bologna che raccoglie l'archivio delle scuole primarie 'Vittorio Bottego' e 'Antonio Silvani' e della scuola secondaria di primo grado 'Salvo D'Acquisto'. In fase di inventario è stato possibile rinvenire la presenza degli archivi scolastici delle scuole elementari 'Giuseppe Bignami' e 'Dino Sassoli' rispettivamente chiuse nel 1984 e nel 1996 con l'abolizione del Circolo didattico II confluito nel IC 3 Lama stesso. Grazie al riordino archivistico complessivo è stato così possibile ricostruire alcuni passaggi storici della scuola locale in seguito a chiusure e cambiamenti seguiti al ridimensionamento e all'autonomia scolastica, permettendo così in futuro il proseguimento degli studi storico-educativi³⁵.

4. Il censimento degli archivi scolastici di Bologna e provincia del 2013-2014

Al 2013-2014 risale l'ultimo censimento degli archivi scolastici della provincia di Bologna, di cui si offrono una breve ricostruzione e alcuni risultati. Nel giugno 2012 furono avviati primi contatti tra il Dipartimento di Scienze dell'educazione 'G. M. Bertin' e la Soprintendenza archivistica dell'Emilia Romagna per una collaborazione sul tema degli archivi scolastici. Ad una prima bozza scaturì la collaborazione per un progetto di censimento, del quale estrapolo la parte introduttiva

Ragioni e ambito di un progetto

La recente normativa dalla fine degli anni Novanta ha concesso alle scuole italiane l'autonomia amministrativa, attraverso la quale possono sempre più contribuire a definire e valorizzare la propria identità storico-culturale, espressa anche dalla documentazione prodotta nel corso del tempo. Gli istituti scolastici e le singole scuole del territorio italiano sono diventati così a pieno titolo soggetti non più solo produttori ma anche conservatori della documentazione del loro istituto, con specifiche funzioni di tutela e salvaguardia del patrimonio archivistico e documentario corrente e di deposito ma anche storico, sotto la sorveglianza delle Soprintendenze archivistiche. La riorganizzazione della rete scolastica, anche con il progressivo costituirsi degli istituti comprensivi, può tuttavia avere come conseguenza la perdita della memoria, della periodizzazione dei soggetti produttori, difficilmente definiti e identificabili perché confluiti in altro soggetto produttore, generando così una sorta di 'vischiosità' archivistica. Inoltre, ancor prima del riassetto scolastico

Dai banchi alle trincee. La Grande Guerra nei documenti dell'archivio storico dell'Istituto Pier Crescenzi, Bologna, I Portici, 2010. Per il Museo si rimanda al link <<http://museocrescenzipacinotti.altervista.org/>> (ultimo accesso: 04.01.2021).

³⁵ <<https://www.cittadegliarchivi.it/pages/searchArchivi>> (ultimo accesso: 05.01.2021).

degli anni Novanta, è noto come gli archivi scolastici siano, tra gli archivi pubblici, quelli a maggior rischio di dispersione per cronica carenza di spazi adeguati, mancanza di fondi necessari alla loro gestione nonché di adeguate professionalità in grado di provvedere ad essi all'interno dei medesimi Istituti scolastici. Per tali ragioni, anche sulla scia di analoghe esperienze italiane svolte in questi anni, la Facoltà di Scienze della Formazione di Bologna e la Soprintendenza archivistica per l'Emilia-Romagna propongono un progetto di censimento degli archivi scolastici pubblici e privati della città di Bologna e della provincia. Il progetto intende produrre il censimento degli archivi scolastici bolognesi di ogni ordine e grado, statali e non, e una mappatura in grado di rilevare di ogni archivio: soggetto produttore, estremi cronologici, consistenza, soggetto conservatore, luogo di conservazione, stato di conservazione, individuando l'articolazione in serie e l'eventuale presenza di materiali e strumenti per la didattica. L'operazione di censimento costituisce la prima delle operazioni necessarie per la salvaguardia degli archivi stessi, propedeutica a rendere possibile la fruizione degli archivi scolastici, troppo spesso sconosciuti sia ai singoli cittadini sia agli studiosi, laddove appare invece sempre più evidente la loro rilevanza scientifica e culturale ai fini della ricostruzione della storia scolastica della città e provincia di Bologna tra Otto e Novecento, ma anche dell'intera storia educativa, didattica e sociale della Nazione dopo l'Unità. Il progetto si rende ancora più urgente e necessario alla luce dei recenti gravi eventi sismici che hanno messo anche le scuole della città di Bologna e della provincia in condizioni di precarietà, ed alcune risultano totalmente o parzialmente inagibili. Risulta evidente come la conoscenza delle situazioni di criticità anche dei patrimoni scolastici in esse presenti possa costituire un elemento importante per la possibile salvaguardia e tutela in una condizione di emergenza.

Date queste premesse si stabilì di definire intenti e modalità in un protocollo d'intesa, siglato in data 29 luglio 2013. Dopo una prima valutazione si propose di circoscrivere il censimento, in una fase iniziale, agli istituti comprensivi e alle direzioni didattiche della città e provincia di Bologna, escludendo quindi il resto delle scuole secondarie già oggetto del precedente censimento della Provincia e anche delle scuole private, per la particolarità della loro storia. La scelta fu dovuta anche alla necessità di comprendere la stratificazione degli archivi delle scuole all'interno delle istituzioni scolastiche dopo gli accorpamenti e la riorganizzazione amministrativa operata a seguito delle leggi sull'autonomia della scuola dal 1997 in poi. Con l'allora referente della Soprintendenza si definì un modello di scheda costruita intorno ad alcuni elementi fondamentali:

- denominazione della scuola
- sede amministrativa
- ubicazione
- nome del dirigente e del referente del censimento
- principali notizie sulla storia dell'Istituto, specie per risalire a cambiamenti di assetto interno, nel passaggio agli istituti comprensivi
- pubblicazioni edite sulla storia dell'istituto scolastico
- la presenza di un archivio della scuola antecedente gli anni '90 del Novecento
- se la documentazione archivistica era conservata in un'unica sede o sedi diverse
- gli estremi cronologici

- la consistenza della documentazione in numeri di faldoni e metri lineari
- la presenza di archivi di altri enti
- la tipologia del materiale (protocolli; fascicoli del personale docente, fascicoli degli studenti, registri di classe, registri dei docenti, compiti in classe, prove d'esame, contabilità)
- altra documentazione conservata (fotografie/diapositive, filmati, audiovisivi, manifesti, microfilm, materiali didattici 'storici', sonoro e altro)
- l'indicazione del grado di conservazione.

Le medesime domande erano indicate per analizzare gli eventuali archivi aggregati presenti nelle scuole, con l'indicazione complessiva anche della data di rilevazione e del referente della compilazione. Tutto sembrava pronto e definito. Si trattava di comprendere come muoversi per contattare le scuole e di capire come inviare le schede. Si è scelto di coinvolgere un terzo ente maggiormente a contatto con le scuole cioè l'Ufficio Scolastico Regionale e in particolare l'Ufficio Scolastico Provinciale, per diretta competenza territoriale. L'ipotesi era che le istituzioni scolastiche avvertissero come meno 'cogente' e più efficace una richiesta dal loro diretto 'superiore' gerarchico rispetto alla Soprintendenza, anche se l'autonomia scolastica assegna alle istituzioni scolastiche la piena responsabilità dei propri archivi scolastici. Nell'autunno 2013 furono presi i primi contatti con i funzionari dell'Ufficio Scolastico Regionale e dell'Ufficio Scolastico Provinciale, che assicurarono piena collaborazione e coinvolgimento nel progetto. La scheda era stata arricchita anche del loro logo e fu da loro inviata alle singole istituzioni scolastiche. La Soprintendenza e il Dipartimento raccolsero le schede che via via venivano inviate dalle scuole, lungo l'arco di circa sei mesi. A fine novembre 2014 la Soprintendenza e il Dipartimento informavano l'Ufficio Scolastico Regionale e Provinciale dei risultati dell'iniziativa di censimento. Il questionario aveva raggiunto 81 plessi scolastici di cui 74 istituti avevano restituito la scheda, cioè oltre il 90%. Tale percentuale era più elevata se si considera che, tra i sette istituti che non avevano inviato la scheda, ne figuravano tre che avevano segnalato l'impossibilità di procedere al censimento a causa dei danni provocati dal terremoto (IC Crevalcore, IC Pieve di Cento e Direzione Didattica San Giovanni in Persiceto). Una ventina di scuole avevano restituito la scheda di censimento compilata in modo parziale, lasciando campi vuoti o indicando informazioni imprecise, a volte per scarsa comprensione di quanto richiesto, a volte per mancanza di tempo e personale adeguato a compiere rilevazioni complete

si evidenzia che a causa degli eventi bellici e delle varie mutazioni dell'istituto possono esserci situazioni incomplete e non rilevabili se non con un controllo accurato ed incrociato che avrebbe bisogno di tempi lunghi di rilevazione e di personale dedicato esclusivamente a questo tipo di lavoro³⁶

³⁶ Compilatore della scheda dell'Istituto scolastico 'Bazzano-Monteveglio'.

anche se nel riepilogo congiunto della Soprintendenza e del Dipartimento di Scienze dell'educazione era indicato come, complessivamente,

si nota anche in molte scuole una discreta capacità di auto-osservazione e auto-valutazione e di consapevolezza dell'importanza del patrimonio archivistico conservato. Ciò vale, per esempio, relativamente alle informazioni sullo stato di conservazione degli archivi e della documentazione³⁷.

Rispetto alla situazione dei singoli archivi solo 25 scuole avevano giudicato “buona” la situazione archivistica (una addirittura “ottima”) della propria scuola, invece una più ampia maggioranza dei casi segnalava come “discreta” o addirittura “insufficiente” per problemi di conservazione dovuti a umidità, impraticabilità, dispersioni, allagamenti, abbandono generale, con la richiesta di un supporto specifico oppure denunciava l'impossibilità di provvedere alla sistemazione dell'archivio per mancanza di risorse

nella primavera del 2013 la direzione ha valutato la possibilità di un intervento da parte di un archivista esperto per una ricognizione tendente al recupero di eventuali dati storici, al riordino ed eventuale scarto. L'ipotesi non è praticabile per indisponibilità economica³⁸.

Già durante la fase di censimento – e anche dopo a partire dai casi più gravi segnalati – la Soprintendenza predispose un piano di ispezioni. Tra questi emerse la difficile condizione dell'archivio dei registri scolastici e delle schede degli obbligati del Comune di Bologna dai primi del Novecento al secondo dopoguerra, depositato nello scantinato della scuola primaria ‘Giulio Giordani’. Fu così organizzato il trasferimento, previo accordo tra il dirigente scolastico, il Comune di Bologna e la Soprintendenza, presso l'Archivio storico del Comune di Bologna, che ne ha curato una prima sistemazione e riordino³⁹.

Questo lavoro di censimento ha permesso di rilevare la condizione degli archivi scolastici ma anche di raccogliere una serie di informazioni sulla loro consistenza quantitativa, sugli estremi cronologici dei documenti conservati, sulla presenza di archivi aggregati e sugli accorpamenti dei fondi prodotti dalla nascita degli istituti comprensivi. Numerosi erano i casi di archivi aggregati, esiti di trasferimenti di materiali e di scuole, che raccontavano la stratificazione

³⁷ Soprintendenza archivistica per l'Emilia Romagna, Lettera di sintesi dei risultati del Censimento degli archivi scolastici sulle scuole primarie e secondarie della provincia di Bologna del 19 dicembre 2014, Prot. n. 4772_2014/01.07.16/22.

³⁸ Compilatore della scheda IC 16 Bologna.

³⁹ G. Santoro, *L'Ufficio servizio di vigilanza sull'adempimento dell'obbligo scolastico del Comune di Bologna*, Tesi di laurea in Archivistica, Relatore Prof. Gianfranco Tortorelli, Facoltà di Lettere e Filosofia, Corso di laurea in Storia, Università di Bologna, Anno accademico 2015-2016. Da segnalare che l'Archivio Storico del Comune di Bologna conserva anche il fondo delle Scuole Pie, l'istituzione scolastica sorta nel 1616 per la formazione elementare maschile e conclusa solo dopo l'Unità, nonché parte del fondo delle scuole ‘Regina Margherita’ e della scuola media ‘Irma Bandiera’.

di documentazione archivistica secolare, ed anche la difficoltà di ricostruire le variazioni amministrative dovute ai riordini della rete scolastica

nasce come Direzione Didattica n°17 fanno parte le scuole primarie Ferrari-Sanzio e Pavese. Nell'anno 1996 con la riorganizzazione scolastica del comune di Bologna diventa direzione n° 5. Fanno parte le scuole primarie Ferrari/Pavese – Sanzio – Jean Piaget. Da settembre 2000 a causa di nuovi dimensionamenti della rete scolastica diventa IC 13 e il nuovo assetto dell'istituto Comprensivo comprende la scuola sec. Leonardo da Vinci e la scuola primaria Ferrari /Pavese. La scuola primaria Sanzio viene accorpata all'IC12 e le Jean Piaget alla Direzione didattica 5. Da settembre 2013 nuovo ulteriore riordino della rete scolastica. Viene soppressa la Direzione Didattica n°13 e all'IC 13 vengono accorpate la scuola primaria Tambroni e la scuola dell'infanzia Tambroni. Pertanto, a settembre 2013 fanno parte dell'IC N°13: Scuola primaria Tambroni – Scuola primaria Ferrari/Pavese – Scuola sec. I° Leonardo da Vinci – Scuola dell'infanzia Tambroni – scuola dell'infanzia Ferrari (statalizzata a settembre 2013)⁴⁰.

Tra le situazioni positive, oltre all'Istituto comprensivo 3 Lame di Bologna già riordinato dalla 'Città per gli archivi', emergevano anche casi di buona conservazione, come l'IC 12 – con la scuola secondaria di primo grado 'Farini' fortemente impegnata anche nella dimensione didattica – e anche casi virtuosi come l'archivio della scuola elementare di Ozzano dell'Emilia, il cui inventario redatto dall'Istituto per i Beni Culturali e Naturali della Regione Emilia-Romagna (IBC) è disponibile online⁴¹. Ulteriori esempi positivi erano l'Istituto comprensivo 2 di Imola il cui archivio, collocato nella scuola 'Giosuè Carducci', si rivela particolarmente importante per almeno tre motivi: per la tipologia del materiale conservato (registri di protocollo dal 1863, registri di classe dal 1864, registri di iscrizione dal 1907 al 1936, registri dei docenti dal 1897); per la presenza di archivi aggregati di scuole del territorio importanti per la ricostruzione delle sedimentazioni archivistiche e della scuola imolese in generale; per la ricchezza e significatività degli interventi di recupero, riordino e inventario realizzati dal 2007, grazie all'intervento degli enti locali e di privati, coordinati dalla Soprintendenza archivistica, con un successo tale da essere stato inserito anche nelle iniziative della Giornata del Fondo Ambiente Italiano (FAI)⁴². Altrettanto virtuosa era la situazione emersa nel caso di Minerbio, comune della pianura bolognese, i cui archivi scolastici sono ad oggi confluiti nell'archivio storico comunale. Ulteriore caso positivo era quello del Comune

⁴⁰ Compilatore della scheda IC 13 Bologna.

⁴¹ <http://archivi.ibc.regione.emilia-romagna.it/ibc-cms/cms.find?flagfind=customXdam-sTree&id=IBCAS00521&munu_str=0_1_1&numDoc=7&docCount=25&docToggle=1&physDoc=1&comune=Ozzano+dell%92Emilia> (ultimo accesso: 05.01.2021).

⁴² P. Mita, *Archivi scolastici: il Comune di Imola*, «IBC. Informazioni, commenti, inchieste sui beni culturali. Istituto per i beni artistici, culturali e naturali della Regione Emilia-Romagna», vol. 3, 2007, pp. 101-102; S. Dall'Ara, P. Mita, *Tra pagelle e registri. Gli archivi scolastici imolesi*, «Università aperta terza pagina», vol. 5, 2007, pp. 10-11; <<https://www.bolognatoday.it/eventi/giornate-fai-primavera-imola-2019.html>> (ultimo accesso: 05.01.2021).

di Budrio sia per tipologia e varietà del materiale (protocolli dal 1967; registri di classe dal 1864; fascicoli del personale docente dal 1915 al 2012, registri dei docenti dal 1948 etc.) sia per gli interventi di recupero e utilizzo dell'archivio per la storia della scuola del Comune, peraltro già oggetto di studi⁴³. Particolarmente interessante il caso dell'Istituto Comprensivo 'Centro' di Casalecchio di Reno, in provincia di Bologna, che conserva l'archivio della Scuola primaria 'Giosuè Carducci', la prima scuola elementare costruita ad hoc nel Comune ai primi del Novecento. Qui esiste un archivio riordinato e inventariato tramite l'intervento del Comune, sotto la sorveglianza della Soprintendenza archivistica, che si offre alla comunità per la ricchezza del materiale costituito dai registri di classe dal 1925, dai fascicoli del personale docente dal 1945 e dai registri degli esami dal 1927 fino agli anni Ottanta. Si tratta di una documentazione interessante, dalla quale emerge la possibilità di ricostruire la storia di questa scuola, con le pratiche didattiche svolte tra fascismo e secondo dopoguerra. Tra le carte, il cui studio è in corso di approfondimento, emergono numerosi elementi importanti sulla scuola reale 'dal basso', ad esempio quella del fascismo caratterizzata dal mito del Duce

Dettato. Il Duce ama tanto i bambini. Pei deboli ha voluto le colonie marina e montane. Aria, luce, sole, vita all'aperto, ginnastica, giochi sportivi, ecc. Ecco la cura per rendere i fanciulli forti, sani, per il bene loro, delle famiglie e della Patria⁴⁴

o quella sconvolta dalla guerra

l'iscrizione a scuola fu limitata come pure la frequenza causa gli allarmi e i bombardamenti. Il programma fu svolto affrettatamente causa il tempo limitato⁴⁵

o in difficoltà all'indomani della Liberazione

le nostre scuole sono completamente distrutte. Provvisoriamente siamo 3 classi in un unico locale. Dopo alcuni giorni sono rimaste nello stesso turno le due prime classi [...] Abbiamo appena i banchi, mancano i calamai e così bisogna usare soltanto la matita. Io trovo utile adoperare la penna fin dal 1° giorno di scuola⁴⁶.

⁴³ F. Servetti Donati, *Le antiche scuole di Budrio*, Bologna, 1959; L. Servetti, A. Sabattini, *La scuola elementare a Budrio dall'Unità all'età giolittiana. La gestione comunale, i maestri, gli edifici*, in M. D'Ascenzo (ed.), *Tutti a scuola? L'istruzione elementare nella pianura bolognese tra Otto e Novecento*, Bologna, CLUEB, 2013, pp. 71-108.

⁴⁴ Comune di Casalecchio di Reno, Archivio scolastico della scuola Carducci, Registro degli scrutini d'esami e degli esami di riparazione, anno scolastico, 1933-1934, Casalecchio, prima classe mista.

⁴⁵ Comune di Casalecchio di Reno, Archivio scolastico della scuola Carducci, 1943-1944, Giornale di classe, Relazione finale, IV mista, maestra Germinia Schiassi.

⁴⁶ Comune di Casalecchio di Reno, Archivio scolastico della scuola Carducci, Registro della classe 1° F dell'insegnante Marescalchi Sacchetti Maria, Cronaca di vita della scuola, Osservazioni sugli alunni, anno scolastico 1945-1946, ottobre 1945, citato in L. Fiocchi, *Un patrimonio storico-educativo a Casalecchio di Reno: i registri scolastici della Liberazione*, Tesi di laurea in Storia della

con le molteplici difficoltà degli insegnanti e gli elementi della cultura materiale

il materiale didattico non è stato fornito affatto. Io provvedo come meglio posso e cerco di farmi aiutare un poco anche dalle famiglie. Ma le case qui sono state tutte distrutte e si può dire che manca tutto. Ad ogni modo la nostra buona volontà arriva sempre a procurare il necessario. La lettura non è ancora arrivata. Supplisco con molti esercizi di lettura alla lavagna, con le intestazioni di giornali, con libri vecchi. Dal 20 cominciano le vacanze di Natale⁴⁷

che molto raccontano anche della didattica 'd'emergenza' di un tempo. Sull'archivio scolastico delle scuole 'Carducci' di Casalecchio di Reno sono state avviate attività di valorizzazione all'interno di una convenzione tra Comune e Dipartimento di Scienze dell'educazione 'G. M. Bertin' per la realizzazione di un progetto di ricerca e didattica dal titolo 'Aula dei ricordi 'Tommasina Giuliani' nel 2012. Essa prevedeva l'utilizzo didattico dell'archivio e di un'aula museo costruita dalle insegnanti nella scuola 'Carducci' per attività di ricerca e didattica di storia della scuola con gli alunni. Nell'anno scolastico 2013-2014 è stato avviato uno specifico progetto dal titolo 'A caccia di storie nella scuola di ieri' che ha coinvolto alunni di seconda elementare in attività di ricerca e didattica nell'archivio scolastico, ma anche di videointerviste ad ex alunni e insegnanti di analisi di materiale fotografico, con un lavoro di memoria scolastica collettiva poi reso noto alla cittadinanza in termini di divulgazione, presentato anche a livello di europeo⁴⁸. Dall'archivio della scuola e del Comune di Casalecchio di Reno è emersa anche la documentazione necessaria per la mostra documentaria dal titolo *Figure magistrali e vita scolastica a Casalecchio di Reno tra Ottocento e Novecento*⁴⁹, con ulteriori approfondimenti sui registri scolastici e sulla memoria fotografica della medesima scuola, restituiti alla

scuola, Università di Bologna, Corso di Studio in Scienze della Formazione Primaria, a. a. 2017-2018, relatrice Prof.ssa Mirella D'Ascenzo.

⁴⁷ Comune di Casalecchio di Reno, Archivio scolastico della scuola Carducci, Registro della classe 1° F dell'insegnante Marescalchi Sacchetti Maria, Cronaca di vita della scuola, Osservazioni sugli alunni, anno scolastico 1945-1946, cit. dicembre 1945.

⁴⁸ M. D'Ascenzo, *Il patrimonio scolastico per educare alla cittadinanza attiva: Poster*, 6 maggio 2016. Poster presentato a Marsiglia nell'ambito del Progetto europeo 'Erasmus Plus School Territory Environment Pedagogy – STEP' <<http://www.comune.casalecchio.bo.it/>> (ultimo accesso: 05.01.2021).

⁴⁹ <<http://www.casalecchiodelleculture.it/archivio/www.casalecchiodelleculture.it/pages/calendar/15/2414-Figure-magistrali-e-vita-scolastica-tra-Ottocento-e-Novecento.html>> (ultimo accesso: 04.01.2021).

comunità in occasione della Festa Internazionale della Storia del 2018⁵⁰, nel quadro di una public history dell'educazione⁵¹.

5. Prospettive per il futuro

Il censimento realizzato tra 2013 e 2014 su Bologna e provincia, pur nei limiti della scarsa completezza nella compilazione di alcune schede e nell'impossibilità di proseguire ad un censimento dettagliato negli archivi scolastici stessi, è stato comunque significativo (e, ad oggi, l'ultimo): da un lato perché condotto da enti con *mission* culturali e competenze diverse, ma accomunati dalla necessità di una tutela, salvaguardia e valorizzazione degli archivi scolastici; dall'altro perché ha fornito la possibilità di conoscere lo stato degli archivi scolastici della provincia di Bologna dopo i numerosi ridimensionamenti della rete scolastica e il terremoto dell'Emilia. Inoltre, il censimento ha permesso alle istituzioni scolastiche di indagare sulla consistenza dei propri archivi sviluppando una maggiore consapevolezza dello stato di conservazione, che costituisce una delle responsabilità attribuite alle scuole dalla legislazione attuale. Nel 2015 è stato stipulato un secondo Protocollo d'intesa con la Soprintendenza archivistica dell'Emilia-Romagna che ha coinvolto il Dipartimento di Scienze dell'educazione 'G. M. Bertin' e l'Ufficio Scolastico regionale dell'Emilia Romagna per una durata triennale. Il progetto, dal titolo 'Gli archivi scolastici come fonti per la ricerca storico-educativa, per l'educazione alla cittadinanza e per la formazione degli insegnanti' era finalizzato a censire la dislocazione e la consistenza degli archivi scolastici nelle scuole dell'Emilia Romagna, approfondire la conoscenza anche di materiali didattici ivi presenti, promuovere la diffusione di percorsi di natura didattica, di alternanza scuola-lavoro e di formazione degli insegnanti per la conservazione e utilizzo degli archivi scolastici⁵². Diversi problemi organizzativi, tuttavia, hanno impedito lo sviluppo del progetto. Pertanto, nel giugno 2019

⁵⁰ L'evento, dal titolo *Memorie scolastiche a Casalecchio di Reno*, si è svolto il 29 novembre 2018 con la presentazione delle tesi di Francesca Ventura e Laura Fiocchi dal titolo, rispettivamente, *Tu ne hai dei ricordi? "Memorie di scuola a Casalecchio di Reno tra fotografia e fonti orali e Un patrimonio storico-educativo a Casalecchio di Reno: i registri scolastici della Liberazione*, discusse nell'anno accademico 2016-2017 presso il Dipartimento di Scienze dell'educazione 'G. M. Bertin' dell'Università di Bologna. Sull'evento si rinvia al link <https://www.comune.casalecchio.bo.it/servizi/eventi/cerca_fase03.aspx?ID=11472> (ultimo accesso: 04.01.2021).

⁵¹ M. D'Ascenzo, *Esperienze di Public History of Education nell'Università di Bologna, tra ricerca scientifica e didattica*, in G. Bandini, S. Oliviero (edd.), *Public History of Education: riflessioni, testimonianze, esperienze*, Firenze, University Press, 2019, pp. 211-221.

⁵² Protocollo d'intesa firmato dalla dott.ssa Euride Fregni per la Sovrintendenza, dal Prof. Luigi Guerra per il Dipartimento, dal dott. Stefano Versari per l'Ufficio Scolastico Regionale dell'Emilia Romagna, dal dott. Stefano Vitali per la Sovrintendenza archivistica dell'Emilia Romagna con Prot. n. 2158 del 16 dicembre 2015.

il Dipartimento di Scienze dell'educazione 'G. M. Bertin' ha stipulato un Protocollo d'intesa con l'Ufficio Scolastico Regionale dell'Emilia-Romagna per avviare nuovamente il censimento degli archivi scolastici, con un progetto dal titolo 'Per una memoria educativa e scolastica collettiva. Gli archivi scolastici come fonti per la ricerca storico-educativa, per l'educazione alla cittadinanza e per la formazione degli insegnanti', tuttora in corso. Gli intenti sono di favorire tutte le forme scientifiche e divulgative utili per la costruzione della memoria educativa e scolastica collettiva, censire la dislocazione e la consistenza degli archivi scolastici nelle scuole dell'Emilia-Romagna, approfondire la conoscenza degli atti conservati negli archivi delle istituzioni scolastiche, inclusi i materiali didattici di carattere didattico scientifico, e promuovere la diffusione di percorsi di natura didattica, di alternanza scuola lavoro e di formazione degli insegnanti per la conservazione e utilizzo degli archivi scolastici⁵³. Ad una prima fase di progettazione è seguita l'emergenza sanitaria legata al COVID-19 che ha purtroppo interrotto ogni iniziativa nel 2020. In realtà proprio la situazione pandemica generale ha rilanciato il tema della scuola, tra presenza, assenza, suo ruolo oggi e nel passato e potrebbero definirsi le condizioni favorevoli, anche operative, per una nuova sensibilità sulla memoria scolastica collettiva centrata sugli archivi, luoghi in cui si custodisce la presenza muta del passato, con la sua materialità dolente. Potrebbe essere il momento, la congiuntura favorevole per una nuova attenzione sugli archivi scolastici affinché possa essere realizzato quanto dichiarato nella *Dichiarazione universale sugli archivi* approvata dall'International Council of archives nel 2010

la responsabilità collettiva nella gestione degli archivi condivisa da cittadini, pubblici amministratori e decisori, proprietari o detentori di archivi pubblici o privati, archivisti e altri specialisti dell'informazione⁵⁴

in quanto

gli archivi conservano testimonianza delle decisioni adottate, delle azioni svolte e delle memorie accumulate. Gli archivi costituiscono un patrimonio unico e insostituibile, trasmesso di generazione in generazione. I documenti archivistici sono gestiti fin dalla loro creazione in modo da preservarne il valore e il significato. Essi sono fonti affidabili di informazione per una amministrazione responsabile e trasparente. Essi giocano un ruolo essenziale nello sviluppo delle società, contribuendo alla costituzione e alla salvaguardia della memoria individuale e collettiva. L'accesso agli archivi arricchisce la nostra conoscenza della società

⁵³ Il testo del Protocollo d'intesa sottoscritto dalla prof.ssa Roberta Caldin e dal dott. Stefano Versari il 24.06.2019 è presente al link <http://istruzioneer.gov.it/wp-content/uploads/2019/06/m_pi.AOODRER.REGISTRO-UFFICIALEU.0012559.24-06-2019.pdf> (ultimo accesso: 04.01.2021).

⁵⁴ <<http://www.archivi.beniculturali.it/index.php/cosa-facciamo/relazioni-internazionali/ica-cia>> (ultimo accesso: 14.01.2021).

umana, promuove la democrazia, tutela i diritti dei cittadini e migliora la qualità della vita⁵⁵.

Alcuni elementi di contesto autorizzano a ben sperare in una nuova sensibilità e attenzione per gli archivi scolastici. Da un lato la nascita della *Società Italiana per lo Studio del Patrimonio Storico Educativo* (SIPSE) che promuove la sensibilità verso la conservazione e valorizzazione del patrimonio storico educativo in Italia, collegata ad altre società simili all'estero come la *Sociedad Española para el Estudio del Patrimonio Histórico-Educativo* (SEPHE). Proprio la SIPSE, in occasione della pandemia, nel luglio 2020 ha lanciato un grido di allarme sulla possibilità che, in occasione di recupero degli spazi per le attività didattiche, vengano sacrificati gli archivi scolastici con scarti incontrollati⁵⁶. L'appello è stato raccolto dal MIBACT che ha condiviso la preoccupazione con le Sovrintendenze e con il MIUR in maniera pubblica⁵⁷. All'interno della SIPSE, peraltro, è stata istituita di recente una Commissione sugli archivi scolastici avente il compito di rilanciare la questione sul piano scientifico sul piano nazionale e territoriali. Infine, si auspica che il recente Comitato tecnico scientifico sulla storia della scuola istituito dal Ministero dell'Università e Ricerca – MIUR nel dicembre 2020, possa promuovere iniziative e trovare nuove risorse, attivando nuove sinergie al fine di sottrarre gli archivi scolastici dall'oblio ed dalla dispersione e restituirli così al loro ruolo di contenitori di fonti per un'aggiornata ricerca storiografica, per la loro valorizzazione didattica e per l'educazione alla cittadinanza, anche ai fini della memoria collettiva, di cui sono straordinari muti custodi⁵⁸.

⁵⁵ *Ibid.*

⁵⁶ <<http://www.sipse.eu/2020/07/29/salviamo-il-patrimonio-culturale-delle-scuole-la-sipse-lancia-un-appello-e-offre-consulenza>> (ultimo accesso: 14.01.2021).

⁵⁷ <<http://www.sipse.eu/2020/09/25/emergenza-covid-19-il-mibact-invita-a-salvaguardare-il-patrimonio-storico-scolastico>> (ultimo accesso: 14.01.2021).

⁵⁸ <<https://www.miur.gov.it/web/guest/-/azzolina-istituisce-il-comitato-tecnico-scientifico-sulla-storia-della-scuola>> (ultimo accesso: 07.01.2021).

¿Qué leen los niños y las niñas? Análisis de sus algunas de sus lecturas desde una perspectiva de género

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What do children read? Analysis of some of their readings from a gender perspective

ABSTRACT: This article addresses this problem by analysing literature for children and young people. The analysis aims to highlight how the socio-cultural constructions that are visible in the protagonists promote stereotypes and can be internalised by boys and girls. This research is based on a qualitative discourse analysis, which aims to identify stereotyped images that are reinforced by the use of stereotyped adjectives. The dialogue and descriptions were revised to enable a classification of different types of roles and ascertain whether or not they are present in most widely-read books, according to the Federation of Spanish Publishers, among children between the ages of 10 and 13 in 2018. The findings reveal the presence, albeit rarely explicit, of many of the identified stereotypes.

EET/TEE KEYWORDS: Gender stereotypes; Gender roles; Children's and young people's literature; Primary education; XXth-XXIst Centuries.

Introducción

La construcción cultural y la creación de modelos rígidos arbitrarios que generan desigualdades ya desde la infancia se pueden abordar desde diferentes perspectivas para transformarlos, hacerlo con la Literatura Infantil y Juvenil (LIJ, en adelante) permite múltiples posibilidades metodológicas.

Estos estereotipos están generados por su contexto social, cultural y educativo, y en él, la LIJ representa una de las formas fundamentales de transmisión de valores, actitudes y comportamientos¹. Esta socialización insiste

¹ C. Kortenhaus, J. Demarest, *Gender Role Stereotyping in Children's Literature: An Update*, «Sex Roles», vol. 28, n. 314, 1993, pp. 219-232.

en la supremacía masculina e incide, por lo tanto en la diferencia de los géneros². Tal y como señala Teresa González en su estudio: «Los textos han transmitido – y aún trasmiten – la valoración de la sociedad sobre las características y comportamientos naturales en ambos sexos, aunque en la familia ya han interiorizado los roles antes de comenzar a leer»³.

La perspectiva de género, responde a la consideración de la crítica literaria feminista de abordar los estereotipos en las obras de la LIJ para investigar el papel de las mujeres y los hombres en ellas y su posible influencia en los y las lectoras más jóvenes⁴. Esta crítica ha puesto de manifiesto como lo femenino ha estado, tradicionalmente, relegado a un segundo plano en todos los ámbitos de la cultura. En la LIJ, no solo por el número menor de autoras reconocidas, sino por el número de protagonistas femeninas o por los estereotipos que se les atribuyen, lo que contribuye a acrecentar el poder masculino⁵. A partir de los años 70 del siglo pasado, la educación, y en relación con esta, la LIJ y el trabajo con textos, empezó a incorporarse en la agenda feminista. Uno de los primeros análisis que se encuentra desde esta perspectiva es el que las autoras norteamericanas Weitzman, Eifler, Hokada y Ross⁶ realizaron sobre los álbumes ilustrados para los niños y niñas en edad preescolar y los estereotipos de género. En este primer estudio, ya se señalaron imágenes en las que, entre otros estereotipos, se vinculaba lo masculino a la esfera pública y lo femenino al cuidado de la prole o de la casa, incluso cuando las ilustraciones representaban animales.

En la década de los 90, comienza a cobrar fuerza el análisis de la LIJ desde una perspectiva de género y aparecen diversos trabajos al respecto. Grupos como la asociación francesa *Association Européenne Du côté Des Filles*, o Teresa Colomer y Adela Turín⁷ en nuestro país, realizaron múltiples análisis de diversas obras de la LIJ llegando a la conclusión de la fuerte presencia de estereotipos de género en ellas. También se pueden encontrar estudios semejantes también en los trabajos de Pardo y Rentero⁸. En todos ellos, la conclusión es siempre la misma: los roles vinculados al género están presentes de una forma muy evidente en las obras estudiadas de la LIJ y esto se vincula a la influencia

² M.I. Menéndez, M. Fernández, *Sobre género y géneros: una lectura feminista de los Juegos del Hambre*, «Dossier Feministes», n. 20, 2015, pp. 173-188.

³ T. González, *Enseñando a ser mujeres: literatura para niñas en la historia de la educación*, «History of Education and Children's literatura», vol. IV, n. 1, 2009, pp. 95-112.

⁴ E. Fernández-Artigas, X. Etxaniz, A. Rodríguez-Fernández, *Imagen de la mujer en la Literatura Infantil y Juvenil vascas contemporánea*, «Ocnos», vol. 1, n. 18, 2019, pp. 63-72.

⁵ F. Arranz, *La eficacia simbólica de los estereotipos de género en la reproducción de la hegemonía masculina. Análisis de contenido de la literatura infantil y juvenil*, «XI Congreso Nacional de Sociología», Madrid, 2013.

⁶ Citadas en: R. León, *Un acercamiento a las investigaciones de la representación de género en la literatura infantil*, «Desde el Sur», vol. 10, n. 2, 2018, pp. 347-362.

⁷ A. Turín, *Los cuentos siguen contando*, Madrid, Las Horas, 1995.

⁸ L. Pardo, E. Rentero, *La figura de la mujer en la literatura infantil*, «CLIJ. Cuadernos de Literatura Infantil y Juvenil», vol. 10, 1997, pp. 30-36.

que pueden tener en los niños y en las niñas, al tiempo que se insiste en la intervención docente para deconstruir estos textos y, en consecuencia, romper estos estereotipos.

En los primeros años del siglo XXI, son varias las investigaciones y trabajos, realizados en América y en Europa, que han abordado el análisis de diferentes obras de LIJ desde una perspectiva de género⁹. En el análisis que Mc Cabe *et al.*¹⁰ realizan, sobre todo, con obras de LIJ en las que aparecen animales, ya señalan que el estereotipo de género está sumamente arraigado en nuestra sociedad y que puede comprobarse por su presencia en este tipo de obras.

Es de destacar el trabajo de Sue Wharton¹¹ en el que aborda la importancia de la representación de los estereotipos de género en los libros de la LIJ aplicando este análisis a una selección de textos, tal y como se hace en el presente artículo. Su propuesta de deconstrucción del texto y de la presencia de esos estereotipos resulta sumamente interesante. Wharton¹² concluye que la supremacía de lo masculino queda patente en los textos analizados, o bien por el número y la presencia de protagonistas varones, o bien por las pautas de comportamiento y actitudes que se les atribuyen.

Estudios más recientes como los de García y Hernández¹³ señalan cómo esa visión sexista que todas las investigaciones anteriores corroboraban, responde a la estructura patriarcal en la que los varones dominan porque son «más fuertes y más racionales y las mujeres son naturalmente débiles, inferiores en el intelecto y en las capacidades racionales e inestables emotivamente»¹⁴. A esta misma conclusión ya habían llegado Chick, Slekar y Charles¹⁵ con su análisis de diversos libros ilustrados publicados entre 2006 y 2008 en Estados Unidos. Al igual que el trabajo citado anteriormente, estos autores comprueban que los roles de género y los estereotipos, están presentes en todos los libros analizados y que en ellos, lo masculino está relacionado con todo aquello que tiene que ver con el deporte, la valentía, lo heroico; mientras que lo femenino representa lo doméstico, el afecto y la sensibilidad. Además, en la LIJ de hoy día, aparece un tipo de heroína muy actual que responde a la idea de que «las chicas pueden

⁹ K. Chick, A. Timothy, D. Slekar, P. Charles, *A Gender Analysis of NCSS Notable Picture Book Winners: 2006-2008*, «Pennsylvania State University», vol. 5, n. 3-21, 2010, pp. 21-35; J. Mc Cabe *et alii*, *Gender in Twentieth-Century Children's Books: Patterns of Disparity in Titles and Central Characters*, «Gender & Society», n. 25, 2011, pp. 197-226.

¹⁰ *Ibid.*

¹¹ S. Wharton, *Invisible Females, Incapable Males: Gender Construction in a Children's Reading Scheme*, «Language and education», vol. 19, n. 3, 2005, pp. 238-251.

¹² Wharton, *Invisible Females, Incapable Males: Gender Construction in a Children's Reading Scheme*, cit.

¹³ J. García, C.I. Hernández, *¿Realidad o fantasía? Roles y estereotipos sexistas expuestos a través de representaciones discursivas e iconográficas en cuentos infantiles*, «Integra Educativa», vol. IX, n. 1, 2016, pp. 91-110.

¹⁴ *Ibid.*, p. 107.

¹⁵ Chick, Timothy, Slekar, Charles, *A Gender Analysis of NCSS Notable Picture Book Winners: 2006-2008*, cit.

ser decididas y desinhibidas»¹⁶ lo que hace que los chicos, atendiendo a que el desarrollo en la pubertad se produce antes en las chicas, pueden ser «más tiernos, desorientados e inexpertos»¹⁷.

Este recorrido sirve como punto de partida para abordar algunos de los estudios que diversos investigadores e investigadoras han realizado sobre los cinco libros más leídos por los lectores españoles entre 10 y 13 años recogidos en la encuesta de *Hábitos Lectores de 2018* de los que se ocupa el presente artículo. Estos estudios previos, facilitan el posterior análisis de los diálogos y las descripciones que respondan a estereotipos de género.

El diálogo en *Harry Potter* es un elemento fundamental que se emplea de forma constante para darle más realismo a la historia al tiempo que involucra más directamente en la acción al público lector¹⁸. A través de ellos, y de descripciones que se suceden en el texto, JK Rowling va introduciendo y presentando a los personajes.

La caracterización de Hermione y Harry suscita diversas opiniones. Hay quienes consideran que Rowling consiguió crear unos personajes duales que varían sus roles de fuerte/activo dependiendo de la circunstancia y esto dota a Hermione de características que rompen con los tradicionales estereotipos de género¹⁹.

Sin embargo, en muchos más estudios, se acusa a Rowling de crear personajes femeninos que no son unas grandes heroínas, tanto en el caso de Hermione, que parece responder al papel de la chica que necesita ser salvada, como en el de las profesoras de Howgarts en donde no hay ninguna que sea tan sabia como Dumbledore²⁰.

Hermione no se muestra ni tan fuerte ni tan segura de sí misma como debería serlo para representar un estereotipo femenino positivo, esto sobre todo se acusa por su carácter y por su falta de control emocional, lo que hace que el público lector la vea más débil que a Harry o a Ron²¹. Parece que Rowling emplea siempre un discurso racional para los personajes masculinos y uno más irracional y emocional para las chicas²². Esto supone que las mujeres aparezcan,

¹⁶ T. Colomer, I. Olid, *Princesas con tatuaje: las nuevas caras del sexismo en la ficción juvenil*, «Textos de Didáctica de la Lengua y la Literatura», 2009, p. 7.

¹⁷ *Ibid.*

¹⁸ C. Fanjul, M.F. Mendoza, *Harry Potter y la cascada de sentidos*, Tesis doctoral, Facultad de Periodismo y Comunicación Social, (Directora: A. Valentino), La Plata, Universidad Nacional de la Plata, Año Académico 2009-2010.

¹⁹ M. Fry, *Heroes and heroines: Myth and gender roles in the Harry Potter books*, «New Review of Children's Literature and Librarianship», vol. 7, n. 1, 2001, pp. 157-167.

²⁰ C. Schoefer, *Harry Potter's girl trouble: The world of everyone's favourite kid wizard is a place where boys come first*, *San Francisco Chronicle*, January 12, 2000, no pagination.

²¹ E.E. Heilman, T. Donaldson, *From Sexist to (sort-of) Feminist Representations of Gender in the Harry Potter series*, in E.E. Heilman (ed.), *Critical Perspectives on Harry Potter*, New York, Routledge, 2009, pp. 139-161.

²² M. Cherland, *Harry's girls: Harry Potter and the discourse of gender*, «Journal of Adolescent & Adult Literacy», n. 52.4, 2008, pp. 273-282.

sistemáticamente, excluidas de actuaciones que impliquen poder o que sean realmente significativas²³.

En los dos libros en forma de diario, *Diario de Greg* y *Diario de Nikki*, el tema central es la popularidad, el acoso escolar y el autoconcepto. Se pueden considerar obras estereotipadas en cuanto al género porque representan la vida de los chicos y de las chicas y cómo se relacionan con las demás personas de una forma totalmente diferente. Para ellas, la popularidad, depende de la belleza y de resultar atractivas para los chicos, mientras que para ellos implica pertenecer a un grupo. Con respecto al acoso, ellos se muestran más agresivos físicamente y a ellas se las caracteriza excluyendo y humillando sobre el aspecto físico o la ropa, lo que las dota de unas características psicológicas más complejas. Aparecen cuestiones positivas como el tema de la amistad y el de la aceptación de uno mismo tal y como es; sin embargo, estas temáticas que podrían resultar tan positivas y enriquecedoras, quedan solapadas por una construcción patriarcal y tradicional de lo femenino²⁴.

El caso de *Geronimo Stilton* se aborda, sobre todo, desde los paratextos que presenta y que hacen que la obra resulte especialmente atractiva para el público y contribuyen a fidelizarlo. Unas obras sencillas, fáciles de leer que se acompañan de tipografía diversa, llena de color y con una serie de características que el público lector rápidamente identifica con el universo de *Geronimo Stilton* lo que ayuda a la comprensión lectora²⁵.

Como señala Carlo Marini²⁶ es justamente este punto de la tipografía, las imágenes y el uso de las onomatopeyas, lo que ofrece la posibilidad de adentrarse aún más en la historia y, por lo tanto, la hace más atractiva.

A Geronimo se le ve como un héroe que no tiene ninguna intención de serlo y que vive aventuras que le suceden inesperadamente y sin que él las busque. Todo lo contrario de lo que sucede con Tea, su hermana, que aparece caracterizada como independiente, aventurera e inteligente y a la que Geronimo admira²⁷.

En *Futbolísimos*, cabe señalar que, las reseñas que aparecen tanto en prensa como en medios digitales, abordan, fundamentalmente, la crítica a la película que versionó el primer volumen de la exitosa saga y no el libro.

²³ S. Hunt, *Representations of gender and agency in the Harry Potter series*, in P. Baker, P. McEnery, T. McEnery (edd.), *Corpora and Discourse Studies*, London, Palgrave Macmillan, 2015, pp. 266-284.

²⁴ N. Taber, V. Woloshyn, *Dumb Dorky Girls and Wimpy Boys: Gendered Themes in Diary Cartoon Novels*, «Children's Literature in Education», n. 42, 2011, pp. 226-242.

²⁵ L. Sánchez, *El papel de los paratextos en la construcción lectora. El caso de Geronimo Stilton*, in R. Tabernero (ed.), *El objeto libro en el universo infantil. La materialidad en la construcción del discurso*, Zaragoza, Prensas de la Universidad de Zaragoza, 2019, pp. 60-71.

²⁶ C. Marini, *Da Rodari a Stilton: Il filo conduttore della fantasia*, «Pagine giovani», vol. XXXIV, n. 1, 2010, pp. II-X.

²⁷ F. Abril, *Geronimo Stilton. Héroe a su pesar*, «CLIJ: Cuadernos de literatura infantil y juvenil», n. 23, 2010, pp. 7-13.

1. Método

La investigación se realizó a través de una metodología cualitativa centrada en la «*tradición lingüística*, que trata al texto como un objeto de análisis en sí mismo»²⁸.

El corpus seleccionado es el que aparece en el informe de *Hábitos de lectura y compra de libros de 2018* en donde se señala que los cinco libros más leídos por los niños y niñas de entre 10 y 13 años²⁹ son: *Diario de Greg*, *Futbolísimos*, *Harry Potter*, *Gerónimo Stilton* y *Diario de Nikki*.

Estas obras dan título también a sus correspondientes y exitosas sagas, concepto que responde al conjunto de novelas que están conectadas por un argumento común que crea, además, un universo propio de fantasía³⁰. Se ha tomado el primer volumen de cada una de estas series como punto de partida de la construcción de sus personajes.

La técnica de esta investigación ha sido el análisis del discurso basado en la propuesta que *Espín et al.*³¹ hacen sobre el abordaje del código lingüístico y, en concreto, de la doble norma o doble estándar que es aquella en la que las palabras adquieren un significado diverso en función del sexo³². Se buscaron, por tanto, imágenes mentales y adjetivos estereotipados que provocan la degradación semántica que se produce cuando el significado de una palabra toma un sentido negativo si se cambia de género³³. Todo ello en la descripción y en los diálogos, teniendo en cuenta que estos últimos consiguen que quien lee se acerque más a lo que está sucediendo a través de las propias palabras de los personajes, y esto permite mayor aproximación e involucración en el mundo de ficción que se crea en la obra³⁴.

A este punto de partida, se sumaron los estudios de autores como Félix Ortega³⁵ que propone cuatro planos de la personalidad para identificar cuestiones de género: el cuerpo, la inteligencia, el carácter y las interacciones sociales, a los que, Colás y Villaciervos³⁶ incorporan otros dos, quedando

²⁸ L. Fernández, ¿Cómo analizar datos cualitativos?, «Butlletí LaRecerca. Institut de Ciències de l'Educació. Universitat de Barcelona», 2006, p. 2.

²⁹ Federación de Gremio de Editores de España, *Hábitos de lectura y compra de libros en España, 2018*, Madrid, Dirección General del Libro, Archivos y Bibliotecas, Ministerio de Cultura, 2019.

³⁰ Menéndez, Fernández, *Sobre género y géneros: una lectura feminista de los Juegos del Hambre*, cit.

³¹ J. Espín et alii, *Análisis de recursos educativos desde la perspectiva no sexista*, Barcelona, Laertes, 1996.

³² *Ibid.*

³³ *Ibid.*

³⁴ M. del C. Bobes, *El diálogo. Estudio pragamático, lingüístico y literario*, Madrid, Gredos, 1992.

³⁵ Citado en P. Colás, P. Villaciervos, *La interiorización de los estereotipos de género en jóvenes y adolescentes*, «Revista de Investigación educativa», vol. 25, n. 1, 2007, pp. 35-58.

³⁶ Colás y Villaciervos, *La interiorización de los estereotipos de género en jóvenes y*

finalmente una categorización de los estereotipos estructurada en seis bloques: cuerpo, comportamiento social, ámbito competencial (habilidades), gestión de las emociones, expresión afectiva y responsabilidad social³⁷.

Por la similitud de los aspectos a analizar, se unificó la gestión de las emociones y la expresión afectiva en una sola categoría denominada Expresión y Gestión de las emociones. Quedando, finalmente, las siguientes áreas.

Table 1. Categorías y aspectos a analizar en las obras seleccionadas

CATEGORÍAS	ASPECTOS A ANALIZAR
Cuerpo	Características referidas a todo lo relacionado con el atractivo físico y el cuidado corporal. Imagen del cuerpo en hombres y en mujeres.
Comportamiento social	Cómo se comportan los personajes en las diversas circunstancias y si este comportamiento está determinado o no por ser hombre o mujer.
Competencias/Habilidades	Qué tareas, destrezas y competencias se atribuyen a hombres y mujeres.
Expresión y Gestión de las emociones	Cómo abordan, manifiestan, gestionan y expresan las emociones y los sentimientos los personajes masculinos y los femeninos.
Responsabilidad social	Reparto de tareas y contribución económica a la familia.

Las obras objeto de análisis:

Harry Potter y la piedra filosofal

Autor/a: J.K. Rowling.

Ilustraciones: Dolores Avendaño.

Título original: *Harry Potter and the Philosopher's Stone*.

Traducción al español: Alicia Dellepiane.

Año: 1ª edición marzo 1999; 18ª edición noviembre de 2000

Editorial: Salamandra (Barcelona)

La saga de Harry Potter ha traspasado la frontera de lo literario y se ha convertido en todo un fenómeno social. Se debe tener en cuenta que algunas de las obras de la LIJ actual y sus versiones cinematográficas han adquirido un éxito enorme no solo entre el público infantil y juvenil, sino en todo el público en general. Estas obras que superan edades y llegan también al público adulto con un lenguaje accesible y con uso del tiempo muy indefinido se denominan

adolescentes, cit., pp. 35-58.

³⁷ *Ibid.*

*crossover books*³⁸ y, sin duda, las novelas de Harry Potter son un magnífico ejemplo de este tipo de obras.

Este primer volumen supone la presentación de los personajes y la llegada a Hogwarts por lo que es especialmente relevante a la hora de generar identificaciones que contribuyan a fidelizar al público.

Diario de Greg. Un pringao total

Autor/a: Jeff Kinney.

Título original: *Diary of a Wimpy Kid*.

Traducción al español: Esteban Morán.

Año: 1ª edición mayo de 2008; 47ª edición octubre de 2016.

Editorial: RBA (Barcelona).

Esta obra recrea el diario de un adolescente que cuenta sus vivencias tanto en el instituto como en su casa con sus hermanos (dos varones) y con su padre y su madre.

Es el primer volumen de una numerosa saga que, como en el caso de *Harry Potter*, también fue llevada al cine con un gran éxito entre el público infantil y juvenil. Supone también la presentación de los personajes principales.

Diario de Nikki. Crónicas de una vida muy poco glamurosa.

Autor/a: Rachel Renée Russell.

Ilustraciones: Rachel Renée Russell.

Título original: *Dork diaries; Tales from a not so Fabulous Life*.

Traducción al español: Esteban Morán.

Año: 1ª edición septiembre de 2010; 18ª edición junio de 2013.

Editorial: RBA (Barcelona)

El *Diario de Nikki* mantiene el formato exitoso de obras como *Diario de Greg*: escrito en páginas rayadas como si se tratara de una libreta, con una tipografía caligráfica, cambios de letras, uso de negrita, ilustraciones que imitan pequeños dibujos que reflejan lo que la protagonista está sintiendo. El libro imita un diario de una adolescente que cuenta sus vivencias desde el 31 de agosto hasta el 10 de octubre, centrándose, sobre todo, en su vida en el instituto y con su familia.

Geronimo Stilton. Mi nombre es Stilton, Geronimo Stilton.

Autor/a: Elisabetta Dami.

Ilustraciones: Larry Keys.

Título original: *Il mio nome è Stilton. Geronimo Stilton*.

Traducción al español: Manuel Manzano.

Año: 1ª edición en esta presentación, enero de 2010.

Editorial: El País, S.L. (Madrid)

³⁸ Menéndez, Fernández, *Sobre género y géneros: una lectura feminista de los Juegos del Hambre*, cit., p. 174.

Saga de gran éxito pese a que, en un principio, ni aparecía en las listas de recomendaciones ni se consideraba como una obra con calidad literaria. Sin embargo, tanto su narrativa sencilla, dinámica, llena de aventuras y fácil de leer junto con unos paratextos tremendamente atractivos y fundamentados en una idea global que, más que una novela, construía todo un universo, hicieron y hacen de estas novelas un gran éxito entre el público joven.

Futbolísimos. El misterio de los árbitros dormidos.

Autor/a: Roberto Santiago.

Ilustraciones: Enrique Lorenzo.

Título original: *Harry Potter and the Philosopher's Stone*.

Traducción al español: Alicia Dellepiane.

Año: 1ª edición mayo de 2013; 4ª edición octubre de 2013.

Editorial: SM (Madrid).

Colección española que ha contado y sigue contando con un gran respaldo del público desde que se publicó el primer volumen. Escrito en primera persona; a través de Francisco, su protagonista, se nos narran diversas aventuras con un toque de misterio que vivirán un grupo de niños y niñas que juegan al fútbol en el mismo equipo.

2. Análisis de resultados

El análisis de las obras se realizó estructurándolo a través de la tabla de categorías anteriormente descrita.

En las obras analizadas, solo se encuentran referencias a este punto al describir a personajes femeninos, siendo, *Diario de Nikki*, la novela en la que más ejemplos hay. En esta obra los estereotipos del cuerpo giran en torno a la belleza, la moda y cómo gustar a los chicos.

Lo malo es que ningún tío macizo [...] se ha enamorado de mí perdidamente gracias al hechizo irresistible de mi brillo de labios³⁹.

También hay referencias al peso y a cómo las mujeres deben mantener una constante rivalidad entre ellas. A través del personaje de una modelo famosa, se ve cómo se califica de “gordas guarronas” a otras chicas que también quieren ser modelos.

³⁹ R.R. Russell, *Diario de Nikki. Crónicas de una vida muy poco glamurosa*, Barcelona, RBA, 2010, p. 27.

Tengo que admitir que en America's Next Top Model me da un poco de miedo. Sobre todo cuando les dice a sus competidoras todas esas cosas como ¡Vosotras, asquerosas Gordas Guarronas! ¡No tenéis futuro en la profesión de modelo!⁴⁰

Hermione Granger es la protagonista femenina de la saga de Harry Potter. En el primer volumen, cuando se le presenta al lector, no se presta especial atención a su aspecto físico. Se hace, sin embargo, una sencilla descripción en la que tiene más peso el adjetivo *mandona*.

¿Alguien ha visto un sapo? Neville perdió uno-dijo. Tenía voz de mandona, mucho pelo color castaño y los dientes de delante bastante largos⁴¹.

En Futbolísimos, los estereotipos relacionados con el cuerpo se aprecian, sobre todo, en las descripciones que hace de Helena, la niña que le gusta al protagonista. Frente al resto de personajes, en donde lo físico carece de importancia, cuando Francisco habla de Helena, menciona lo guapa que es o lo grandes que tiene los ojos.

Helena tiene los ojos más grandes que he visto en mi vida, y es tan guapa que no sé qué más puedo decir de ella⁴².

Comportamiento social

Es el área en el que más ejemplos de estereotipos se encuentran y en los dos Diarios es en donde más marcados aparecen.

Diario de Greg:

Sin embargo, había un par de chicas en la parte delantera de la clase que tenían una visión muy distinta. [...] Querían un robot que te avisara de la citas y que en los dedos tuviera diez barras de labios de diferentes tonalidades. A todos los chicos esto nos pareció lo más estúpido que habíamos oído nunca. Así que nos dividimos en dos grupos: chicos y chicas. Nosotros nos fuimos al otro lado de la clase, mientras que las chicas se quedaron charlando de sus cosas⁴³.

Frente a esto, los chicos están descritos como brutos, fuertes y peleones. «A los chicos del instituto SIEMPRE les gusta ver una pelea»⁴⁴.

⁴⁰ Rusell, *Diario de Nikki. Crónicas de una vida muy poco glamurosa*, cit., pp. 34-35.

⁴¹ J.K. Rowling, *Harry Potter y la piedra filosofal*, Barcelona, Salamandra, 2000, p. 92.

⁴² R. Santiago, *Futbolísimos. El misterio de los árbitros dormidos*, Madrid, SM, 2013, p. 12.

⁴³ J. Kinney, *Diario de Greg. Un pringao total*, Barcelona, RBA, 2008, p. 148.

⁴⁴ *Ibid.*, p. 207.

En esta obra, el comportamiento del padre parece más el de un cómplice o un aliado que el de una figura de responsabilidad, papel que asume su madre, quien parece ser quien manda en casa, impone castigos, va a visitar al profesorado o al director del colegio de Greg y determina qué hacer en cada momento.

Lo bueno de papá es que, cuando se enfada, luego se le pasa enseguida y ya está. [...] En cuestión de castigos, mamá tiene un comportamiento completamente distinto. Si la armas y mi madre te pillá, lo primero que hace es tomarse unos días para pensarse el castigo que va a ponerte⁴⁵.

Esta tónica se mantiene a lo largo del libro, excepto cuando Greg pide una casa de muñecas en Navidad. Aquí se impone el padre por considerar que no era un regalo apropiado para un niño.

Aquel año, cuando mis padres vieron mi lista de regalos, tuvieron una gran discusión. Papá decía que de ninguna manera yo iba a tener una casa de muñecas. Pero mamá opinaba que podía resultar saludable para mí ‘experimentar’ con todo tipo de juguetes que yo quisiera. Por increíble que pueda parecer, papá se impuso en aquella discusión. Me dijo que volviera a escribir la lista y que esta vez escogiera juguetes más ‘apropiados’ para chicos⁴⁶.

En el *Diario de Nikki*, el éxito social para las chicas se basa, en una gran parte del libro, en tener un móvil nuevo, ropa de marca, amigos y ligues, lo que hace que se vincule todo con lo superficial, los superfluo y lo efímero.

El último número de la revista *That’s so hot* dice que el secreto de la felicidad está en la fórmula ADML: Amigos, Diversión, Ligues y Moda⁴⁷.

Además, se insiste en la rivalidad constante entre las chicas y que, ante un chico, da igual la amistad.

Fue en ese momento cuando decidí que, aunque la honradez era una buena cosa en una amiga, el que tuviera capacidad para enrollarme con tíos macizos era bastante más interesante⁴⁸.

En *Gerónimo Stilton*, no se encuentran apenas usos estereotipados o roles que se atribuyan de forma específica a los personajes masculinos y femeninos. De hecho, en el libro, Geronimo Stilton, que es el protagonista, insiste en varias ocasiones en lo intrépida, aventurera y valiente que es su hermana, Tea. Pinky, la joven ratona que Geronimo contrata como ayudante, se presenta también como un personaje que domina la tecnología, que es atrevida, que no se aminora por nada y que incluso enseña a cambiar de estilo vistiendo al propio Gerónimo

⁴⁵ *Ibid.*, pp. 38-39.

⁴⁶ *Ibid.*, p. 117.

⁴⁷ Russell, *Diario de Nikki. Crónicas de una vida muy poco glamurosa*, cit., p. 22.

⁴⁸ *Ibid.*, p. 223.

lo que hace que, al final del libro, el protagonista reconozca que ha cambiado y, que, en gran parte, se lo debe a Pinky.

¡A partir de hoy, todo va a cambiar! Por lo pronto en mi despacho quiero muebles diferentes, modernos, quizá un poquito alocados, colores alegres, no sé, amarillo, rojo, azul, verde, e incluso fucsia y naranja, ¿Por qué no?⁴⁹

Sí es cierto que los estereotipos aparecen de forma sutil, como cuando llama a Pinky para ir de compras porque son las chicas las que entienden de moda o la sección del periódico de la que ella se ocupa que se llama *Sensacional* y en la que, tal y como explica Pinky:

En el periódico hay información sobre las últimas tendencias de la moda, sobre los secretos de las estrellas, etcétera, etcétera, etcétera⁵⁰.

En *Futbolísimos*, los estereotipos que aparecen vinculados a esta área se relacionan con el mando y con el saber. Siempre que se describe a las mujeres comportándose de este modo, se hace de una forma peyorativa. También tiende a calificarse de extraño todo aquello que hacen las chicas, como si el único patrón de medida o de normalidad fuese el dado por los varones.

A los de la asociación de madres y padres de alumnos les gusta mucho reunirse y tomar decisiones. Sobre todo a la madre de Anita, que se llama Laura, y es una sabionda y una doña Perfecta y una mandona. En mi clase hay muchas chicas que hacen cosas muy extrañas, que mejor no las voy a contar porque seguro que nadie las creería⁵¹.

Este tipo de estereotipos peyorativos vinculados al mando y al saber se dan también en el personaje de Hermione.

Hermione se negaba a hablar con Harry y Ron, pero como era una sabionda marimandona, los chicos lo consideraron como un premio⁵².

Capacidades

En *Harry Potter*, JK Rowling deja claro, desde el inicio, que Hermione es mucho más estudiosa e inteligente que Harry y que Ron, pese a que esto le acarrea que no quieran estar con ella.

⁴⁹ E. Dami, *Geronimo Stilton. Mi nombre es Geronimo Stilton*, Madrid, El País, S.L., 2010, p. 105.

⁵⁰ *Ibid.*, p. 108.

⁵¹ Santiago, *Futbolísimos. El misterio de los árbitros dormidos*, cit., p. 25.

⁵² Rowling, *Harry Potter y la piedra filosofal*, cit., p. 139.

-No es raro que nadie la aguante- dijo a Harry, cuando se abrían paso en el pasillo-. Es una pesadilla, te lo digo en serio.

Alguien chocó contra Harry. Era Hermione. Harry pudo ver su cara y le sorprendió ver que estaba llorando.

-Creo que te ha oído.

-¿Y qué?-dijo Ron, aunque parecía un poco incómodo-. Ya debe haberse dado cuenta de que no tiene amigos⁵³.

En este aspecto, es fundamental señalar que la amistad de Harry y Hermione comienza a hacerse fuerte cuando Harry y su amigo Ron la salvan de un troll en el capítulo 10: «Pero desde aquel momento Hermione Granger se convirtió en su amiga»⁵⁴ reproduciendo lo que Marta Roqueta⁵⁵ denomina el tropo de la *dama en peligro*. Así, la joven que parecía tan segura de sí misma y que tantas cosas sabía, se muestra débil y necesita de la protección y el cuidado del protagonista masculino lo que le permite a este recuperar protagonismo y convierte a Hermione en una simple compañera de aventuras del verdadero héroe.

Hermione Granger estaba agazapada contra la pared opuesta, con aspecto de estar a punto de desmayarse. [...] Entonces Harry hizo algo muy valiente y muy estúpido: corrió, dando un gran salto y se colgó, por detrás, del cuello de aquel monstruo⁵⁶.

Harry Potter es el héroe y el gran protagonista de la saga. Hermione aparece como una figura dependiente de él, lo que hace que Harry se gane el protagonismo, no solo por aparecer más en la obra, sino por prestigio y dominio⁵⁷.

-[...] Yo soy Hermiones Granger. ¿Y vosotros quiénes sois?

Dijo todo aquello muy rápidamente.

Harry miró a Ron y se calmó al ver en su rostro aturdido que él tampoco se había aprendido todos los libros de memoria.

-Yo soy Ron Weasley-murmuró Ron

-Harry Potter-dijo Harry.

-¿Eres tú realmente?-dijo Hermione-. Lo sé todo sobre ti, por supuesto, conseguí unos pocos libros extra para prepararme más y tú figuras en Historia de la magia moderna. Defensa contra las Artes Oscuras y Grandes eventos mágicos del siglo XX⁵⁸.

⁵³ *Ibid.*, p. 145.

⁵⁴ *Ibid.*, p. 151.

⁵⁵ M. Roqueta, *Zena*, 14 de Octubre de 2016, <<http://zena.cat/es/representacion-de-genero-en-harry-potter>> (ultimo acceso: 4.10.2020).

⁵⁶ Rowling, *Harry Potter y la piedra filosofal*, cit., pp. 148-149.

⁵⁷ Menéndez, Fernández, *Sobre género y géneros: una lectura feminista de los Juegos del Hambre*, cit.

⁵⁸ Rowling, *Harry Potter y la piedra filosofal*, cit., p. 92.

Como les ocurre a muchos otros, en un primer momento, el héroe rechaza su misión y trata de rebelarse contra ella para después asumir su papel y llevarlo hasta las últimas consecuencias respondiendo así a las fases que Joseph Campbell recoge en *El héroe de las mil caras*⁵⁹ (Campbell, 1959). Al inicio de la obra se siente un tanto cohibido frente a Hermione que se presenta más inteligente y con más capacidad para el estudio y la magia que él, pero, a medida que avanza la obra, Harry se posiciona como valiente, atrevido y desobediente lo que hace que los roles y los estereotipos se vayan asentando progresivamente.

Harry había sido siempre flaco y muy bajo para su edad. Además, parecía más pequeño y enjuto de lo que realmente era, porque toda la ropa que llevaba eran prendas viejas de Dudley, y su primo era cuatro veces más grande que él. Harry tenía un rostro delgado, rodillas huesudas, pelo negro y ojos de color verde brillante. Llevaba gafas redondas siempre pegadas con cinta adhesiva, consecuencia de todas las veces que Dudley le había pegado en la nariz. La única cosa que a Harry le gustaba de su apariencia era aquella pequeña cicatriz en la frente, con la forma de un relámpago⁶⁰.

Otro estereotipo que suele repetirse, relacionado con las capacidades, es el que tiene que ver con la habilidad matemática y científica que se supone escasa en las chicas. El *Diario de Nikki* se hace eco de esta idea y así la plasma.

Hoy teníamos el examen de matemáticas con el cálculo de volúmenes y yo estaba muy nerviosa. Más que nada porque las matemáticas no se me dan muy bien⁶¹.

El tema de la habilidad física y la capacidad para el deporte se recoge en *Futbolísimos*. Queda claro que el hecho de que haya niñas que jueguen bien al fútbol o que corran rápido resulta extraño o incluso parezca que no es propio de ellas sino de chicos.

Con el número 3, Marilyn, lateral izquierdo. Corre tan rápido que a veces te olvidas de que es una niña⁶².

Expresión y Gestión de las emociones

En la mayor parte de las obras, la expresión de los sentimientos, se vincula con lo femenino. En el *Diario de Greg*, se identifica con su madre, a quien el protagonista usa de “excusa” para justificar la escritura de lo que él mismo

⁵⁹ J. Campbell, *El héroe de las mil caras*, México, Fondo de Cultura Económica, 1959.

⁶⁰ Rowling, *Harry Potter y la piedra filosofal*, cit., p. 24.

⁶¹ Rusell, *Diario de Nikki. Crónicas de una vida muy poco glamurosa*, cit., p. 87.

⁶² Santiago, *Futbolísimos. El misterio de los árbitros dormidos*, cit., p. 12.

califica como “memorias” y no como diario por la posible connotación peyorativa que él cree que tendría.

Fue idea de mi madre, no mía. Está loca si cree que voy a escribir aquí mis ‘sentimientos’ y tonterías por el estilo⁶³.

En *Futbolísimos*, como el protagonista es un chico, desprecia todo aquello que implique sentimientos o emociones, llegando incluso a calificarlo de “cosas horribles”.

¿Éramos un equipo de fútbol o un grupo de cotillas hablando de novios y novias y otras cosas horribles?⁶⁴

En el *Diario de Nikki*, aparece, de forma constante a modo de hilo conductor, el enamoramiento de la protagonista con uno de los chicos de su instituto. Todo acaba girando en torno a la expresión de esos sentimientos, manteniendo la idea del amor romántico y la entrega al mismo.

Cada detalle de su rostro perfecto ha quedado grabado de una manera permanente en mi corazón. ¿Será que me estoy enamorando por primera vez?⁶⁵

Tanto en esta obra como en *Harry Potter*, la gestión emocional se vincula con los personajes femeninos en momentos de debilidad y en los que el autoconcepto y la autoestima se generan en función de lo que piensen o digan los personajes masculinos con los que se relacionan.

No hay referencias a la gestión emocional de los chicos, como si esta estuviese siempre en permanente control o como si los varones no necesitaran desarrollarla. Además se identifica emoción con debilidad o falta de carácter lo que coloca en posición de inferioridad a las mujeres.

Responsabilidad social

Esta área se refiere a cómo se reparten las tareas o de quién provienen los ingresos económicos. No se han encontrado referencias explícitas para este apartado. Podría interpretarse como implícita la que se aprecia en la madre y el padre de Greg en *Diario de Greg*, en la que se dice que la madre es la que va a ver al director del centro y la que se ocupa de las cuestiones básicas de la casa, sin embargo, no hay ningún diálogo ni descripción en el que aparezcan explicitados estereotipos que puedan vincularse a esta área seguramente porque

⁶³ Kinney, *Diario de Greg. Un pringao total*, cit., p. 1.

⁶⁴ Santiago, *Futbolísimos. El misterio de los árbitros dormidos*, cit., p. 43.

⁶⁵ Rusell, *Diario de Nikki. Crónicas de una vida muy poco glamurosa*, cit., pp. 58-59.

las obras se dirigen a un público infantil y juvenil y la parte de provisión de recursos para el hogar no es algo que forme parte de la vida de los protagonistas.

Conclusiones

Tras el análisis de las obras seleccionadas, podemos apreciar, de forma general, que los estereotipos de género aparecen, consciente o inconscientemente, de forma sutil, tal vez porque hoy día, el sexismo explícito podría ir en detrimento de la obra⁶⁶.

La carga de estereotipos no es igual en las cinco obras analizadas, y aquellas que adoptan el formato de diario son mucho más explícitas en el uso de adjetivos o de comportamientos estereotipados. Hay, sin embargo, una serie de rasgos, que, de un modo u otro, aparecen reflejados en todo el corpus escogido. Así, cuando, se trata de abordar desde una perspectiva de género la competencia verbal, lo femenino siempre se relaciona con una excesiva verborrea y una gran fluidez de lenguaje, mientras que a los varones se les identifica con una mayor reserva e introspección y que, por lo tanto, evitan las manifestaciones personales y emocionales, aspecto en el presente análisis que coincide con las conclusiones aportadas por Colás y Villaciervos⁶⁷.

De este modo, en el *Diario de Greg*, los estereotipos que aparecen están vinculados directamente con las actitudes y comportamientos del padre y la madre, y también con las compañeras del instituto. Todos los que se han encontrado hacen referencia a expresión de emociones, comportamiento social o a la preocupación de sus compañeras por la belleza/cuerpo de un modo superficial. Pese a no existir diálogos, la propia estructura del diario ya facilita descripciones y mensajes en estilo indirecto en los que se encuentran ejemplos de cada uno de los tipos de estereotipos señalados.

En la otra obra seleccionada en forma de diario, *Diario de Nikki*, la protagonista, plantea los estereotipos que se les atribuyen a las adolescentes: la preocupación por el aspecto físico y por la moda, gustar a los chicos, querer integrarse y formar parte de un grupo popular, la rivalidad con otras chicas y ser una “cotilla”.

Como ocurre en el *Diario de Greg*, aunque no haya diálogos en estilo directo, el mismo diario ya facilita descripciones y mensajes donde poder encontrar los estereotipos que se señalan.

⁶⁶ M.C. Hamilton et alii, *Gender Stereotyping and Under-representation of Female Characters in 200 Popular Children's Picture Books: A Twenty-first Century Update*, «Sex Roles», n. 55, 2006, pp. 757-765.

⁶⁷ Colás, Villaciervos, *La interiorización de los estereotipos de género en jóvenes y adolescentes*, cit.

Los múltiples estudios que en los últimos años se han hecho sobre diversos aspectos de *Harry Potter*⁶⁸, ofrecen perspectivas diversas sobre el papel de Harry y de Hermione como protagonistas masculino y femenino respectivamente. En el análisis realizado, aparecen algunos rasgos que apuntan a esa imagen de Harry como héroe y Hermione como una figura dependiente de él, lo que permite que el protagonista pueda «recuperar su autoestima masculina»⁶⁹.

Tanto en *Geronimo Stilton* como en *Futbolísimos* son escasas las apariciones de aspectos vinculados a los estereotipos de género. *Geronimo Stilton* es la obra en la que menos estereotipos aparecen, no se han encontrado apenas ejemplos de estos y los que se señalan aparecen de una forma sutil.

Los que se han analizado en *Futbolísimos*, se encuentran en los primeros capítulos cuando el niño de 11 años protagonista de la historia, se presenta y hace lo mismo con el resto de personajes. Una vez que se han descrito, los estereotipos se quedan diluidos en la trama y el desarrollo de la aventura. Es de destacar también que aparecen muchos personajes femeninos en la obra y que tienen papeles relevantes en el desarrollo de la trama.

En todas las obras, los chicos tienen marcado, desde el inicio, un modelo de éxito determinado por el patriarcado; triunfan cuando son fuertes, valientes, deportistas e inteligentes. Incluso cuando, como en el caso de Francisco en *Futbolísimos*, temen enfrentarse a materias como matemáticas, acaban teniendo éxito porque se sienten seguros a la hora de afrontar nuevos retos, algo que, como se podía ver en el personaje de Nikki, no sucede con las chicas que, en este aspecto desarrollan una autoestima mucho más baja lo que influye en la creación de estereotipos de superioridad masculina que se van arraigando desde edades tempranas⁷⁰.

Además, las relaciones que se plasman en las obras entre mujeres, chicas o niñas, son totalmente diferentes a las de la camaradería de los varones; excepto las que se establecen entre mujeres que son familia, el resto de las relaciones suele ser de rivalidad y si surge la amistad es tras una serie de dificultades⁷¹.

⁶⁸ Cherland, *Harry's girls: Harry Potter and the discourse of gender*, cit.; Fanjul, Mendoza, *Harry Potter y la cascada de sentidos*, cit.; Heilman and Donaldson, *From Sexist to (sort-of) Feminist Representations of Gender in the Harry Potter series*, cit.; Hunt, *Representations of gender and agency in the Harry Potter series*, cit.; Menéndez, Fernández, *Sobre género y géneros: una lectura feminista de los Juegos del Hambre*, cit.; Schoefer, *Harry Potter's girl trouble: The world of everyone's favourite kid wizard is a place where boys come first*, cit.; N. Tucker, *The rise and rise of Harry Potter*, «Children's literature in education», n. 30, vol. 4, 1999, pp. 228-229.

⁶⁹ Colomer, Olid, *Princesas con tatuaje: las nuevas caras del sexismo en la ficción juvenil*, cit., p. 9.

⁷⁰ M.E. Simón, *Convivencia y relaciones desiguales, Proyecto Nahiko*. Vitoria, Emakunde, 2005, <https://www.emakunde.euskadi.eus/contenidos/informacion/proyecto_nahiko_formacion/es_def/adjuntos/2005.03.02.elena.simon.pdf> (ultimo acceso: 4.10.2020).

⁷¹ Arranz, *La eficacia simbólica de los estereotipos de género en la reproducción de la hegemonía masculina. Análisis de contenido de la literatura infantil y juvenil*, cit.

Pese a los aspectos anteriormente referidos, el corpus de obras de LIJ seleccionado, refleja, en cierto modo, los avances y las carencias que se han dado y se siguen dando en la superación de los géneros y la búsqueda de la igualdad⁷². Aparecen personajes femeninos que desempeñan papeles o roles tradicionalmente masculinos, y aunque sus descripciones se cuidan más y se trata de que los estereotipos aparezcan de forma más sutil, aún quedan muchos roles y estereotipos que romper y que decodificar para que los niños y las niñas no asuman dichas construcciones de género que acentúan todavía más la brecha de la desigualdad.

Es importante, por lo tanto, a este respecto, que se insista y se ayude a que, en la infancia, se aprenda a diferenciar lo que es la identidad biológica y lo que son patrones de comportamiento generados, de forma arbitraria, por la sociedad, al tiempo que, desde los centros escolares, se potencien prácticas de lectura crítica y de deconstrucción de los textos desde una perspectiva de género⁷³.

⁷² Colomer, Olid, *Princesas con tatuaje: las nuevas caras del sexismo en la ficción juvenil*, cit., pp. 11-12.

⁷³ Wharton, *Invisible Females, Incapable Males: Gender Construction in a Children's Reading Scheme*, cit.

The place of infrastructure in early childhood education schools in research carried out in Brazil

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ABSTRACT: The study addresses the state of knowledge in dissertations and theses from postgraduate programmes in Brazil on the subject of infrastructure in early childhood education schools, produced in the period from 2008 to 2018. The database used to survey was the Brazilian Digital Library of Theses and Dissertations (BDTD). The results were organised in tables, highlighting the number of dissertations found, selected abstracts and full pieces read. Thirty theses and dissertations were found and 12 were selected for analysis. The study initially surveyed programmes aimed at early childhood education able to invest in infrastructure. Concluded that research on the infrastructure of early childhood education schools is a promising field that needs to be explored, particularly in the North and Northeast regions of Brazil, as there are few specific studies. The analyses show low investment in infrastructure in spaces aimed at children, considering the few programmes focused specifically on early childhood education at the federal level.

EET/TEE KEYWORDS: History of education; Early childhood education; School infrastructure; Educational policies; Brazil; XXIst Century.

Introduction

In Brazil, early childhood education is the first stage in basic education. It has the aim of promoting the development of children of up to five years of age in several aspects, supplementing action by their family and the community in which they live¹. Hence, at this stage of schooling, we must engage in dialogue with the family and community to offer education that develops the child's physical, psychological, intellectual, emotional, affective and social aspects. This is because early childhood education is a place of exchange, in which experiences lived in the family environment must be expanded during the interactions that take place in school.

In its 1988 Federal Constitution (FC)², Brazil acknowledged and declared the child as a citizen, a subject in the development process with explicit rights. At the same time, they stated that it is the duty of the State to ensure this education, thus, triggering the need to reach the different populations that live throughout the Brazilian territory, which includes offering early childhood education in the city, countryside, riverside regions and forests. However, in addition to stating it to be the right of all children, the law that regulates education in the country³ also established minimum quality standards it has to meet. This implies offering education to all children, with pedagogical and physical infrastructure, as well as age appropriate human resources (babies from zero to 18 months, very young children – 19 months to three years of age – and small children, between the ages of four and five).

Therefore, thinking of a school environment that provides full development to children in early childhood education consists in building and maintaining institutions that offer conditions and instruments that respect local, regional, cultural and age differences. Such aspects do not materialise just with the power of the letter of the law, but require political will, with financial investments for early childhood education. The core issue of this discussion was defined based on this: research centres and institutions have concerned themselves with developing studies that mobilise sectors of society vis-à-vis the problem of offering quality early childhood education, which includes appropriate infrastructure. But do they study educational policies aimed at early childhood education infrastructure?

¹ See Brazil, National Congress, *Law No 8,069, of 13 July 1990*. Established the Child and Adolescent Statute, <http://www.planalto.gov.br/ccivil_03/leis/l8069.htm> (last access: 13.01.2020).

² See Brazil, National Congress, *Constitution of the Federative Republic of Brazil of 1988*, Brasilia, DF, Senate, 1988, Last updated: 7.05.2020, <http://www.planalto.gov.br/ccivil_03/constituicao/constituicao.htm> (last access: 10.06.2020).

³ See Brazil, National Congress, *Law No 9.394, of 20 December 1996*, National Education Guidelines and Framework Law, <http://www.planalto.gov.br/ccivil_03/leis/l9394.htm1> (last access: 05.01.2020).

Such aspects are not being seen in the implementation of some early childhood education policies and despite Brazil having some legal frameworks like the 1988 Federal Constitution, the Child and Adolescent Statute⁴ and more recently, the Legal Framework for Early Childhood - Law No. 13.257/2016⁵, the offer of early childhood education is still deficient. Therefore, this study aimed to survey the state of knowledge in dissertations and theses on early childhood education infrastructure, submitted to postgraduate programmes between 2008 and 2018. In addition, it looked at educational policies designed for the funding of infrastructure in early childhood education schools.

For research development purposes, we chose as database the Brazilian Digital Library of Theses and Dissertations (BDTD), which works as a repository of published theses and dissertations in Brazil. The Sucupira Platform, which has only concentrated research from 2013 onwards, was not considered in this study, however, it will certainly serve as the most reliable data source, as long as its time limit is considered. In addition to allowing the building of the state of knowledge, the research found contributed to the debate on infrastructure in early childhood education schools, based on studies developed by authors Zabalza and Horn⁶. The studies address the quality of such education level and look at actions, programmes and projects developed at the scope of the federal government, most of which aimed at improving the infrastructure of early childhood education schools.

1. Method

As explained by Ferreira⁷, research known as state of the art and state of knowledge has gained significant space in the field of education, because as they have a bibliographic nature, they map and discuss certain academic production.

⁴ See Brazil, National Congress, *Law No 8,069, of 13 July 1990*. Established the Child and Adolescent Statute, <http://www.planalto.gov.br/ccivil_03/leis/l8069.htm> (last access: 13.01.2020).

⁵ See Brazil, National Congress, *Law No 13.257, of 8 March 2016*, Provides for early childhood public policies, (Early Childhood Legal Framework), Brasília, <http://www.planalto.gov.br/ccivil_03/_ato2015-2018/2016/lei/l13257.htm> (last access: 05.01.2020).

⁶ See M.A. Zabalza, *Qualidade em Educação Infantil*, Porto Alegre, Artmed, 1988 and M.G.S. Horn, *Sabores, cores, sons, aromas: a organização dos espaços na Educação Infantil*, Porto Alegre, Artmed, 2004.

⁷ See N.S.A. Ferreira, *As pesquisas denominadas "Estado da Arte"*, «Educação & Sociedade», vol. 23, n. 79, 2002, pp. 257-272, <<http://www.scielo.br/pdf/es/v23n79/10857.pdf>> (last access: 02.02.2020).

Romanowski and Ens⁸ make a distinction between studies known as state of the art and state of knowledge, pointing out that they allow for a view of what has been produced in the area. For the authors, state of the art is called so because it reaches a whole area of knowledge. On the other hand, state of knowledge studies are called so because they address a single sector of publications on the topic being looked at. This is in line with our research proposal, which does not intend on exhausting sources, but rather looks for studies developed by postgraduate programmes offered by research institutions that generate dissertations and theses as a product.

Initially, we read the information available on the Ministry of Education's (MEC) official website to identify educational policies (actions, programmes, projects) aimed at improving the infrastructure of early childhood education schools, developed at the scope of the federal government. This was also important for the next step, which was deciding on the search descriptors used in the state of knowledge part of the research.

The state of knowledge development process was done in two stages: first, dissertations and theses addressing the physical and pedagogical infrastructure of early childhood schools in Brazil were carefully examined. The following criteria were used as parameters to do that: 1) the Brazilian Digital Library of Theses and Dissertations (BDTD), which is part of the theses and dissertation information systems in teaching and research institutions in Brazil. It also encourages the registering and publishing of theses and dissertations in electronic format; 2) time period of 11 (eleven) years (2008 to 2018); 3) published in Portuguese; 4) previous reading of the abstracts; and 5) dissertations whose themes were not relevant to the subject addressed by this paper were not analysed.

Having established these criteria, we proceeded to the second stage. At BDTD we used the descriptors Early Childhood Education Infrastructure, *Proinfância*, Early Childhood Education and Pedagogical Infrastructure. When defining the descriptors, the paper's object of study was considered as a priority: the infrastructure of early childhood education schools. This was done because of other experiences with this type of data collection, as depending on the descriptor, many results not related to the object of study will pop up. Hence, the option was made to go straight to the main point and work only with descriptors that led to more precise results, as in directly to the research theme. In addition, we also consider the initial survey carried out on the Ministry of Education's (MEC) official website, which took us to the *Proinfância* descriptor, as this was a government programme designed with the ultimate aim of expanding access of children from zero to five years of age, and improving the infrastructure of early childhood education schools.

⁸ See J.P. Romanowski, R.T. Ens, *Pesquisas denominadas do tipo "Estado da arte" em educação*, «Diálogo Educ», vol. 6, n. 19, 2006, pp. 37-50.

After the search using the descriptors, the information was organised in tables for better viewing and then, we proceeded to read the titles, abstracts and finally, the whole papers that were selected. After concluding this stage, the content of the publications was analysed. These first two stages did not intend to summarise what has been published, but seek general information about the theme.

2. Results

2.1. Infrastructure programmes aimed at early childhood education

In order to guarantee the right to quality early childhood education, the drafting and delivering of public policies, materialised in programmes and actions, must pay attention to improvements and teaching quality. For Oliveira⁹ these mechanisms are «[...] measures for rights to be realised, satisfactions met, so that constitutional and legal determinations are put into practice and become useful to the governed». In the case of early childhood education, in relation to public power, this implies in planning physical spaces that ensure mobility, playing, interaction and socialisation of different experiences on behalf of the child. It also means assigning appropriate furniture and materials to institutions, paying attention to teacher training and managers, among other actions that require policy design.

When looking at funding for early childhood education, it is clear that there are direct and indirect programmes: direct programmes are the ones specifically designed for early childhood education; indirect programmes cover all stages of basic education and one way or another, provide for early childhood education.

Among the programmes directly aimed at early childhood education, with a view to improving infrastructure and access, respectively, the National Programme for the Restructuring and Acquisition of Equipment for the Public Early Childhood Education Network (*Proinfância*) and the Brazil *Carinhoso* Programme may be found. Table 1 shows information on how these programmes work, their goals and who they are aimed at.

⁹ See R.F. Oliveira, *Curso de Direito Financeiro*, São Paulo, RT, 2006, p. 251.

Table 1. Programmes specifically aimed at early childhood education

Early Childhood Education Programmes			
Programme	Linked to	Goal	Implementation and Execution Methodology
National Programme for the Restructuring and Acquisition of Equipment for the Public Early Childhood Education Network (<i>Proinfância</i>)	Federal Government, through the Ministry of Education (MEC)	Ensuring children's access to daycare centres and schools, as well as improving the physical infrastructure of the early childhood education network.	The municipality interested in being serviced by the <i>Proinfância</i> drafts a Coordinated Actions Plan (PAR), based on its educational situation diagnosis. It fills out and sends electronically the forms and documents available on the Ministry of Education's Integrated Monitoring, Execution and Control System (SISMEC), PAR Module, indicating the physical infrastructure actions referring to engineering works and services, with the respective figures for service.
Brazil <i>Carinhoso</i> Programme	Federal government	Covering expenses related to the maintenance and development of early childhood education, contributing with comprehensive care, food and nutritional security actions, in addition to ensuring access and the permanence of children in this level of education.	Automatic transfer of financial resources, without the need for an agreement or other similar instrument. Transfers to municipalities and the Federal District are made in two instalments. The amount is calculated based on 50% of the minimum annual sum per enrolment in public or affiliated daycare centre, full and part-time, defined by the Fund for the Maintenance and Development of Basic Education and Appreciation of Education Professionals (FUNDEB).

Source: see <<http://www.fnde.gov.br/>> (last access: 05.10.2018).

The *Proinfância* was established by Resolution No.6, of 24 April 2007, with a view to ensuring access of children from 0 to 5 years of age to daycare and preschools, as well as improving physical infrastructure in early childhood education schools. The programme is aimed at municipalities and the Federal District and focuses on two main areas: the building of daycare centres and preschools and the procurement of furniture and equipment.

Flores and Albuquerque¹⁰ claim that the *Proinfância* brought an 'extremely relevant political-pedagogical dimension, added to the physical expansion of municipal early childhood education networks' (sp), that is, for the authors, the

¹⁰ See M.L. Flores, S.A. Albuquerque, *Proinfância*, ANPED (National Association), 2016.

programme has been contributing significantly not only to extend the service at this stage, but also to establish and consolidate the identity of early childhood education.

Despite Flores and Albuquerque's analysis, a recent *Transparência Brasil* publication (*Transparência Brasil*, 2019) – NGO that assists in transparency and social control of the public power – shows that the *Proinfância* has undergone some changes since it started in 2007, as from its follow-up, the National Education Development Fund (FNDE) noted that projects in municipalities were not being concluded. As a result, the programme was adjusted in 2012, with its methodology being tweaked again in 2015. Even so, according to information in the *Transparência Brasil* document (*Transparência Brasil*, 2019), the results are not satisfactory. In fact, they are unsatisfactory in general, not just in some municipalities, but in the whole country. The main problems pointed out were:

1. flaws in the planning of the construction works; 2. inadequacies in the drafting of bidding documents; 3. omissions and careless staging of the bidding process; 4. deficient contract oversight by town halls; 5. visible inadequacies in the construction work delivered¹¹.

The situation of such a programme is rather unfortunate, as access to early childhood education for children from zero to three years of age has been compromised, after all, the target of the National Education Plan (PNE) (Brazil, 2014) was to service 50% of children in that age group. However, School Census¹² data, considering the 2010 demographic census¹³, indicates that in 2014, Brazil serviced 26% of children from zero to three years of age, while in 2019, it only reached 27% of the population in the same age group, in other words, it has not been growing very much. It is possible that if the *Proinfância* had achieved greater success, this percentage would be higher and Brazil would be closer to the PNE target, even if that is still far from ensuring the constitutional right, established by the Brazilian Constitution and other laws and national education guidelines enacted since 1988.

Now, the Brazil *Carinhoso* Programme was established by Law No 570, of 14 May 2012, with the goal of benefiting families in situation of poverty or extreme poverty. The resources are allocated to students of ages from zero to 48 months, enrolled in public or affiliated daycare centres, whose families are beneficiaries of the *Bolsa Família* Programme. The financial support is owned

¹¹ See *Transparência Brasil*, *Transparente: resultados positivos para avaliação qualitativa*, 2019, p. 29, <<https://www.transparencia.org.br/downloads/publicacoes/Obra%20Transparente%200706.pdf>> (last access: 20.02.2020).

¹² See: in 2014, there were 2,897,928 enrolments of children from zero to three years of age (Brazil). In 2019, there were 3,755,092 children from zero to three years of age, <<http://portal.inep.gov.br/web/guest/sinopses-estatisticas-da-educacao-basica>> (last access: 02.02.2020).

¹³ See Population of Brazil from 1 to 4 years of age in 2010 = 11,082,915. Population from 1 to 4 years of age in 2019 = 13,796,159, <<https://www.ibge.gov.br/estatisticas/sociais/populacao/9662-censo-demografico-2010.html>> (last access: 02.02.2020).

to the municipalities and the Federal District, which must inform the number of children who fit the already mentioned features the previous year.

With different goals in relation to the *Proinfância*, the Brazil *Carinhoso* Programme has been reaching Brazilian municipalities, but does not assist in expanding access to education: it only acts on the quality of care provided to the children who are already in the system.

In addition to the *Proinfância* and Brasil *Carinhoso*, there are other nationwide programmes that fund the whole of basic education and thus, also cover early childhood education, even if not exclusively. In one way or another, such programmes aim to bring improvements to education in infrastructure terms. For better understanding, a table has been drawn up, pointing out the programmes and their goals.

Table 2. Federal Basic Education Funding Programmes

Programme	Goal
National School Meal Programme (PNAE)	To offer school meals, and food and nutritional education actions to students in all stages of public basic education.
<i>Caminho da Escola</i> Programme	To renew, standardise and expand the school vehicle fleets in the municipal, state and Federal District's public basic education networks.
Direct Money for School Programme (PDDE)	To provide financial assistance to schools on a supplementary basis, in order to contribute to the maintenance and improvement of the physical and pedagogical infrastructure, thus, elevating academic performance. It also aims to strengthen social participation and school self-management.
National School Library Programme (PNBE)	To promote access to culture and encourage reading by students and teachers by distributing collections of literature, research and reference works.

Source: see <<http://www.fnnde.gov.br/>> (last access: 25.10.2018).

The National School Meal Programme (PNAE) offers meals in school, and food and nutritional education to basic education students. To achieve this, the federal government transfers funds to states and municipalities, based on the School Census conducted the year before, showing the number of students enrolled in the education systems. The transfer is made in 10 monthly instalments (from February to November) to cover 200 school days. The amount transferred by the federal government, per school day for each student, is decided according to the stage and type of education: in the case of early childhood education, daycare centres get R\$ 1.07 per student/day and for preschool, R\$ 0.53 per student/day.

In its turn, the *Caminho da Escola* Programme targets basic education public system students, mainly those living in rural and riverside regions. It is up to educational managers to purchase vehicles through three options: financial assistance from the FNDE within the scope of the Coordinated Actions Plan (PAR), own resources and BNDES credit line. The Direct Money for School Programme (PDDE) was created in 1995, with a view to improving physical and pedagogical Infrastructure and focuses on public basic education schools in the state and municipal systems.

The National School Library Programme (PNBE) has been developed since 1997. The service includes early childhood education schools, primary and secondary education schools and is divided into three actions: PNBE Literature, which assesses and distributes literary works; PNBE Periodicals, which distributes journals with practical and methodological content; and PNBE Teacher, which supports the pedagogical practice of basic education teachers. Therefore, they are programmes that in some way assist in improving the physical and pedagogical infrastructure of early childhood education schools. However, demand is much higher than what the Brazilian State supplies for.

The survey showed that investments are not enough for a repressed demand of over 70% of the population from zero to three years of age. Therefore, our central issue was to verify whether in their postgraduate programmes, research educational institutions have presented research aiming to analyse early childhood education, particularly aspects focusing on the infrastructure of schools for children under six.

Hence, the results of the survey conducted using the descriptors defined and presented in the item Paths travelled on, procedures and instruments used, may be found below.

2.2. State of knowledge of research on early childhood education infrastructure

For the state of knowledge study on research done on postgraduate programmes in Brazil, academic production was firstly mapped vis-à-vis the BDTD. The information found allowed to identify author, title of paper, advisor, institution, degree (thesis or dissertation), language, publishing date, subject and link for download.

Table 3 presents the results obtained from the BDTD, pointing out the number of dissertations and summaries found, in addition to pieces read. Using the three descriptors, the result was a total of 21 dissertations, of which only seven (07) were selected for analysis, as others did not address the topic of this paper.

Table 3. State of Knowledge in Dissertations - BDTD Database

Descriptors	Results	Selected abstracts	Pieces read	Pieces and links
Early Childhood Education Infrastructure	8	3	3	– Educação infantil pública e privada na RMBH: uma análise a partir do Censo Escolar 2014, <http://tede.fjp.mg.gov.br/handle/tede/366> – Qualidade na educação infantil no Recife como meio de consumo coletivo: discursos e práticas, <http://www.tede2.ufrpe.br:8080/tede2/handle/tede2/7521> – Política educacional e espaço físico escolar: a infraestrutura como dimensão na garantia de padrão de qualidade., <https://rd.uffs.edu.br/handle/prefix/715>
<i>Proinfância</i>	11	3	3	– Monitoramento e avaliação do Programa Nacional de Reestruturação e Aquisição de Equipamentos para a Rede Escolar Pública de Educação Infantil - Proinfância: uma proposta metodológica, <http://repositorio.unb.br/handle/10482/14797> – A implementação do Proinfância em Juiz de Fora e seus desdobramentos, <https://repositorio.ufjf.br/jspui/handle/ufjf/445> – Uma avaliação da implementação do Programa Proinfância em Erechim: a política dos espaços escolares, <https://rd.uffs.edu.br/handle/prefix/692>
Early Childhood Education and Pedagogical Infrastructure	2	1	1	– <i>A expressão do pedagógico na gestão escolar da educação infantil</i>, <http://repositorio.unesc.net/handle/1/4885>
Total	21	7	7	

Source: see drafted by authors based on BDTD at, <<http://bdtb.ibict.br/vufind/>> (last access: 02.10.2018).

The information collected shows that most dissertations are linked to postgraduate programmes in education. However, we mapped dissertations linked to other areas, such as management and economics. Despite some papers being linked to these areas, they provided important contributions on the researched topic. It is worth mentioning that the research is concentrated in the South, Southeast and Central-west regions in Brazil, with just one study coming from the Northeast.

Dissertations selected from the Early Childhood Education Infrastructure descriptor specifically discuss the quality of institutions, examining demand and supply in some municipalities.

One of the selected pieces was the dissertation *Educação Infantil Pública e Privada na RMH: uma análise a partir do Censo Escolar 2014* (Private and Public Early Childhood Education in RMH: an analysis using the 2014

School Census)¹⁴. The study looks into the offer and quality of early childhood education institutions in the Belo Horizonte Metropolitan Region (RMBH). It investigated public institutions managed by municipalities or state, private institutions and private institutions with municipal or state agreement. In addition, in relation to the quality of offer, it points out that private schools that hold an agreement did not meet the parameters of the analysis in the student per class item. Public institutions' worst performance was in the offer of spaces and materials suitable for early childhood education, as well as less availability of playgrounds, children's toilets and libraries. Private schools with no agreement showed to be better than the rest, but had more teachers with inadequate training, according to criteria established by Brazilian legislation, in Article 62 of the National Education Guidelines and Framework Law, LDB de 1996. Finally, the research suggests that regulation should come together with a cooperation and oversight structure, in addition to social control of public expenditure aimed at the partner network. Therefore, increasing resources of public institutions would be a factor that would change the existing situation.

Despite being a paper linked to a postgraduate programme on consumption, the dissertation *Qualidade na Educação Infantil no Recife como meio de consumo coletivo: discursos e práticas* (Quality in Early Childhood Education in Recife as a collective consumption means: discourse and practices)¹⁵, brings many contributions on the topic. The study had the aim of analysing whether the National Quality Parameters and Indicators¹⁶ for Early Childhood Education have been established as effective instruments for adopting improvements in the municipal early childhood education network in Recife, state of Pernambuco. It also intended to understand what early childhood education professionals think in relation to the concept of quality and the documents mentioned above.

The study pointed out that even though the Quality Parameters for Early Childhood Education were published about 10 years ago (same time the research was done) and the Quality Indicators 7 years ago, these documents are little known by managers, coordinators, teachers and assistants. Regarding the social representation of professionals, early childhood schools always

¹⁴ See R.P.O. Ferreira, *Educação infantil pública e privada na RMBH: uma análise a partir do Censo Escolar*, 104f, Dissertation (Master's in Public Administration), Escola de Governo Professor Paulo Neves de Carvalho, João Pinheiro Foundation, Belo Horizonte, 2014, <<http://tede.fjp.mg.gov.br/handle/tede/366>> (last access: 15.12.2019).

¹⁵ See W.M. Lima, *Qualidade na educação infantil no Recife como meio de consumo coletivo: discursos e práticas*, 153 f, Dissertation (Postgraduate Programme in Consumption, Daily Life and Social Development), Federal Rural University of Pernambuco, Recife, 2016.

¹⁶ See Brazil, Ministry of Education, *National quality parameters for early childhood education*, Basic Education Secretariat, Brasília, MEC/SEB, 2006, <<http://portal.mec.gov.br/seb/arquivos/pdf/Educinf/eduinfparqualvol1.pdf>> (last access: 05.01.2020) and Brazil, National Congress, Ministry of Education, *Early Childhood Education Quality Indicators*, Basic Education Secretariat, Brasília, MEC/SEB, 2009, <http://portal.mec.gov.br/dmdocuments/indic_qualit_educ_infantil.pdf> (last access: 05.01.2020).

appear in precarious situations, in terms of teacher training and physical and material infrastructure. Through interviews, the study found that the quality standard of ideal early childhood education would be possible with substantial public investment, appropriate training and working conditions, continuous education, systematic updating and furthering quality related knowledge.

The study carried out buy the dissertation *Políticas Educacionais e Espaço Físico Escolar: a infraestrutura como dimensão na garantia de padrão de qualidade* (Educational Policies and Physical School Space: infrastructure as a quality assurance dimension)¹⁷ was part of our research. The paper analysed normative references and public actions at the scope of national proposals for the schools physical space after 1988, verifying if there are factors to establish quality conditions in Brazilian basic education. It first addresses school spaces in several historical periods. It also looks at the school census from 2010 to 2013, showing through these analyses that the Northeast and North regions are the most deprived in relation to physical infrastructure. Early childhood education was not analysed specifically, however, the study points out that in terms of physical space, it is the stage of basic education most left aside. Based on the findings using the first descriptor, it is important to emphasise that the dissertations explain that in order to reach quality in early childhood education, physical infrastructure is a determining factor.

Only three dissertations were selected with the *Proinfância* descriptor, as per established criteria. The dissertation *Monitoramento e avaliação do Programa Nacional de Reestruturação e Aquisição de Equipamentos para a Rede Escolar Pública de Educação Infantil - Proinfância: uma proposta metodológica* (Monitoring and evaluation of the National Programme for the Restructuring and Acquisition of Equipment for the Public Early Childhood Education Network: a methodological proposal)¹⁸, had the goal of developing a methodology for monitoring and evaluating the *Proinfância*. It also mapped the problems involving the programme's implementation, as well as analysing the needs to improve it. The research built a panel of indicators for monitoring and supporting the evaluation of the *Proinfância*.

In addition to a document analysis, interviews were conducted with managers and technicians from the agencies in charge of planning and delivering the programme at the federal level. It is possible to identify difficulties in the implementation stage, more specifically in its delivery, as well as in the

¹⁷ See R. Dallagnol, *Política educacional e espaço físico escolar: a infraestrutura como dimensão na garantia de padrão de qualidade*, Dissertation (Master's), Education Postgraduate Programme, Fronteira Sul Federal University, Chapecó/SC, 2015, <<https://rd.uffs.edu.br/handle/prefix/715>> (last access: 04.04.2019).

¹⁸ See L.M. Rezende, *Monitoramento e avaliação do Programa Nacional de Reestruturação e Aquisição de Equipamentos para a Rede Escolar Pública de Educação Infantil - Proinfância: uma proposta metodológica*, 177f, Dissertation (Professional Master in Education), University of Brasília, Brasília, 2013.

bidding and construction process. The author points out that there is a lack of evaluations, which may have accentuated some of the programme's problems and that construction and bidding activities are its critical points.

The second selected dissertation, entitled *A implementação do Proinfância em Juiz de Fora e seus desdobramentos* (The Implementation of the Proinfância in Juiz de Fora and its developments)¹⁹, makes an analysis of the difficulties faced during the programme's implementation. The programme was implemented by members of the Education Secretariat, with a view to identifying possible problems in this process. The study shows that the implementation of the *Proinfância* in the municipality of Juiz de Fora was linked to budgetary conditions, local specificities and the way in which those in charge of putting it into effect conducted it. According to interviews carried out during research, Ministry of Education (MEC) standard projects make construction unfeasible, as the municipality does not have areas of the size established in the projects available.

Another dissertation analysed was *Uma avaliação da implementação do programa Proinfância em Erechim: a política dos espaços escolares* (An evaluation of the implementation of the *Proinfância* programme in Erechim: a policy for school spaces)²⁰. The research sought to analyse the programme starting at its implementation, focusing particularly on the structuring of the school space. It also looked at FNDE documents that guide the programme and collect data from *Proinfância* managers in the municipality of Erechim (state of Rio Grande do Sul).

Even with standard projects, the municipality of Erechim made changes to enable the building of schools, but other developments were not carried out due to insufficient budget. Daniela Vanessa Klosinski, the study's author, points out a counterpoint about the *Proinfância*: on the one hand, ensuring services for small children and on the other, gaps identified in the arrangement and structuring of the programme's school spaces.

Two papers were found using the descriptor Early Childhood Education and Pedagogical Infrastructure, but only one was selected, entitled *A expressão do pedagógico na gestão escolar da educação Educação Infantil* (Expressing pedagogy in early childhood education school management)²¹. The author seeks to find how pedagogical actions are revealed in the day-to-day management of early childhood education centres in the municipality of Criciúma, Santa

¹⁹ See C.S. Mattos, *A implementação do Proinfância em Juiz de Fora e seus desdobramentos*, 148f. Dissertation (Master's in Management and Evaluation in Public Education), Juiz de Fora, Federal University of Juiz de Fora, 2014.

²⁰ See D.V. Klosinski, *Uma avaliação da implementação do Programa Proinfância em Erechim: a política dos espaços escolares*, 132f. Dissertation (Education Postgraduate Programme) Fronteira Sul Federal University, Chapecó/SC, 2016, <<https://rd.uffs.edu.br/handle/prefix/692>> (last access: 15.12.2019).

²¹ See S.M. Fernandes, *A expressão do pedagógico na gestão escolar da educação infantil*, 143f, Dissertation (Education Postgraduate Programme), Universidade do Extremo Sul Catarinense, Criciúma/SC, 2016, <<http://repositorio.unesc.net/bitstream/1/4885/1/So%C3%AAnia%20Maria%20Fernandes.pdf>> (last access: 02.02.2020).

Catarina state. The research analysed official documents to identify actions by the management team, emphasising pedagogical aspects and comparing discourse and the documents. The result found that the pedagogical aspect is not very expressive in the documents and managers only pay attention to administrative and bureaucratic activities. It also provides a reflection on the importance of the pedagogical element in school management, in order to achieve educational goals.

Despite research bringing a lot of data on the topic, it is clear that the little we have makes increasing educational policies aimed at the physical and pedagogical infrastructure of early childhood education schools difficult. Moreover, the education area has not advanced in relation to developing research on the conditions of early childhood education infrastructure, particularly in the North and Northeast regions.

Like the dissertations, the theses located in the BDTD database were organised in Table 4. The analysis showed that there is little research at the doctoral level that addresses the subject of physical and pedagogical infrastructure in early childhood education. The search using the descriptors resulted in nine theses, out of which five were selected for reading, as they were more directly linked to the subject of this study.

Table 4. State of Knowledge in Theses - BDTD Database

Descriptors	Results	Selected abstracts	Pieces read	Pieces and links
Early Childhood Education Infrastructure	5	3	3	– Políticas públicas para a educação infantil em Porto Velho/RO (1999/2008), <http://hdl.handle.net/11449/101515> – A implementação da política pública de educação infantil: entre o proposto e o existente, <http://repositorio.unicamp.br/jspui/handle/REPOSIP/250863> – Os espaços das pré-escolas municipais de São Paulo: projetos, usos e transformações, <https://tede2.pucsp.br/handle/handle/9865>
Proinfância	1	1	1	– Política pública e educação infantil: um estudo sobre a implantação do Programa PROINFÂNCIA em Brasília, <http://repositorio.unb.br/handle/10482/32799>
Early Childhood Education and Pedagogical Infrastructure	3	1	1	– Professoras de crianças de 0 a 3 anos: dialogando sobre seus percursos formativos e os desafios enfrentados, <https://repositorio.ufscar.br/handle/ufscar/2315>
Total	9	5	5	

Source: see drafted by authors based on BDTD at, <<http://bdtd.ibict.br/vufind/>> (last access: 02.10.2018).

All theses located are linked to postgraduate programmes in education. However, like the dissertations, most of the pieces found were conducted in the South, Southeast and Central-west regions, with only one being done in Brazil's North region.

The theses selected using the descriptor Early Childhood Education Infrastructure address public policies related to the topic. This can be seen in the thesis *A implementação da política pública de Educação Infantil – entre o proposto e o existente* (Early childhood education public policy – between what is proposed and what is there)²², which tries to understand the implementation of public policies in the municipality of Ilhéus between 2006 and 2012. According to the author, interviews with counsellors, unit managers and the Education Secretariat showed that federal level policies do not match those at the municipal level. Indeed, this is a fact that the researcher states may be linked to a lack of clarity in relation to what a collaboration regime means.

The research also reports that the growth of formal and informal units is notable in the municipality of Ilhéus. However, it happens in a disorderly way, with no planning, quality criteria, fair investments and without considering the basic parameters of infrastructure, inadequate and/or improvised spaces (rented properties). In the research, the author also points out how unprepared managers and teachers are when it comes to early childhood education.

The second thesis selected, entitled *Políticas públicas para a Educação Infantil em Porto Velho/RO (1999/2008)* (Early childhood education policies in Porto Velho/RO (1999/2008))²³, analyses early childhood education public policies developed by the Municipal Education Secretariat (SEMED) from 1990 to 2008. It shows that during this period, early childhood education took over different spaces in discourse, when actions were put into effect.

The author points out that between 1999 and 2004, early childhood education in Porto Velho carried less importance in municipal educational policies. There were few actions to train teachers, increase offering and improve infrastructure of schools. However, from 2005 to 2008 there were changes: SEMED placed the stage as a priority, increasing enrolments and the physical network, with social participation in the defining of policies. The study concludes that in order for quality early childhood education to be consolidated, political prioritisation of the stage is essential, from the planning of actions, all the way to increasing resources, expanding and improving infrastructure in schools.

Another thesis selected was *Os espaços das pré-escolas municipais de São Paulo: projetos, usos e transformações* (Municipal preschool spaces in São Paulo:

²² See C.M.S.D. Alves, *A implementação da política pública de educação infantil: entre o proposto e o existente*, Thesis (PhD), Education Department, Campinas State University, Campinas, SP, 2013.

²³ See J.M. Pacífico, *Políticas públicas para a educação infantil em Porto Velho/RO (1999/2008)*, 358f, Thesis (Doctorate in School Education), Faculty of Sciences and Letters of Araraquara, Paulista State University, SP, 2010.

projects, use and transformation)²⁴. The main goal was to discuss the space of municipal preschools in São Paulo, with a view to analysing their projects, uses and transformations throughout time, taking into account national and municipal curricular proposals and authors, who discuss this topic. The study reveals the importance of bringing governing bodies and communities closer for the planning of early childhood education institutions.

The only thesis selected through the descriptor *Proinfância* was entitled *Política pública e educação infantil: estudo sobre a implantação do Programa Proinfância em Brasília* (Public policy and early childhood education: study on the implementation of the *Proinfância* Programme in Brasília)²⁵ and points out that the programme was only implemented in the federal capital in 2012. The building of daycare centres and preschools is still pending. The author also points out that local managers play a central role in the implementation of the federal programme. Moreover, the availability of resources for the implementation of the programme varies.

The only thesis selected by the descriptor Early Childhood Education and Pedagogical Infrastructure was *Professoras de crianças de 0 a 3 anos: dialogando sobre os percursos formativos e os desafios enfrentados* (Teachers of children from 0 to 3: a dialogue on the formative paths and challenges faced)²⁶. The research aimed to identify how learning takes place and what type of learning, during the training of early childhood teachers, which focuses on working professionally with children from zero three years of age.

The study's conclusions confirm the initial hypothesis that there are gaps in the initial training of early childhood education teachers, particularly for those working with children aged zero to three. However, according to the author, these gaps are filled during work, something the study refers to as "learning at the institution". The learning is the result of their relationship with students and their families, other teachers, the pedagogical support team, the infrastructure on offer, studying and training and the school's pedagogical proposal.

²⁴ See R.K. Duarte, *Os espaços das pré-escolas municipais de São Paulo*, «National Association of Education Postgraduate and Research», Rio de Janeiro, 2015, <<http://www.anped.org.br/news/proinfancia-entrevista-com-maria-luiza-flores-ufrgs-e-simone-albuquerque-ufrgs>> (last access: 04.04.2019).

²⁵ See R.S. Almeida, *Política pública e educação infantil: um estudo sobre a implantação do Programa Proinfância em Brasília*, Thesis (PhD), Education Department, Education Postgraduate Programme, University of Brasília, 2018.

²⁶ A.C. Bragatto, *Professoras de crianças de 0 a 3 anos: dialogando sobre seus percursos formativos e os desafios enfrentados*, Thesis (PhD in Human Sciences), São Carlos Federal University, São Carlos, 2013.

Discussion and conclusion

We return here to the central issue of this study, which was to identify research centres and institutions that have been developing studies that mobilise sectors of society vis-à-vis the problem of offering quality early childhood education. Whether they study educational policies aimed at early childhood education infrastructure was also identified. It has been seen that such studies are done, but the volume of research, given the size of the problem, is still rather small.

A brief analysis of the theses and dissertations submitted in postgraduate programmes in Brazil, between 2008 and 2018, focusing on the subject of physical and pedagogical infrastructure, allows us to point out that despite being few, the topic looks to be a promising field, which deserves to be explored, particularly in the North and Northeast regions of the country. Such analyses allow us to think that there are many issues involving the subject that could be the object of research. We shall point out three aspects, which will be addressed below.

The first is exploring the physical and pedagogical infrastructure theme in early childhood education schools. It could be the object of study of research lines in postgraduate programmes, as well as areas of focus of these programmes' support groups, focusing on public policies and evaluating the ones aimed at early childhood education. Another point to highlight is the furthering of empirical aspects, seeking to understand and propose innovative projects in relation to physical spaces and pedagogical materials of early childhood education schools.

The last aspect is the involvement of undergraduate student teachers with the theme. Considering that they will work in schools, the idea is to encourage teachers linked to undergraduate teacher training courses, particularly those preparing future professionals who will work with children in this level of education, to develop scientific initiation and extension projects to analyse and propose small improvements to physical spaces and pedagogical environments in schools. This would mean investing in purposeful research, as in addition to analysing, they could include small and medium impact extensionist (interventionist) actions, making the student think of alternatives. Indeed, they would learn ways to make demands to the public power to ensure rights are complied with, but with empirical and scientific grounds.

It has also been seen that like research, educational programmes, actions and projects developed by the public system are insufficient to provide quality early childhood education to all children in Brazil.

Finally, we point out that given the few programmes proposed by the federal government presented in this paper, the *Proinfância* could be considered the most viable for building early childhood education schools, as the resources would be transferred by FNDE and would not come out of municipal coffers. However, the way it was proposed and due to the deadlocks it has shown, the *Proinfância* also needs to be rethought to actually meet local and regional specificities and needs.

La «scoperta» dell'infanzia e la valorizzazione delle pratiche educative: riflessioni sullo sviluppo epistemologico della ricerca storico-educativa sulla prima infanzia

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The «discovery» of infancy and the enhancement of educational practices: considerations on the epistemological development of the historical and educational research on early childhood

ABSTRACT: This paper intends to go over the itinerary followed by the history of early childhood. Starting with the description of the Greek *paideia* up to the XX Century, this work underlines the most relevant phases of the Western pedagogical journey, throughout an overview of the educational theories and interventions. Considering these evidences and the last epistemological status, it seems necessary to implement a renovated educational and historiographical research, which must work on the evaluation of the *real* early childhood and on the enhancement of new resources. In fact, only after a meaningful reconsideration of the action learning theories and of the educational relationship, it will be possible to draw up new inclusive and consistent pedagogical guidelines.

EET/TEE KEYWORDS: History of Education; Early Childhood; Pedagogical Theories; Educational pattern; Classical era; XXth Century.

Premessa

Al fine di individuare i nodi cruciali che, nel corso dei secoli, hanno causato l'evoluzione culturale della concezione di infanzia e del *sentimento*

dell'infanzia¹, l'attuale indagine storiografica non può di certo esimersi dall'analisi dell'itinerario epistemologico che, dalla *paideia* greca, giunge fino alla rivoluzione "puerocentrica" del secolo scorso.

La «scoperta dell'infanzia», intesa come processo di «comprensione dell'infanzia reale», è di fatto identificabile come un «evento storiografico»² che, periodicamente, ha determinato i paradigmi "scientifici" e culturali dell'azione educativa delle singole comunità; ogni stagione storica, infatti, è stata caratterizzata da una specifica considerazione dell'infanzia e, di conseguenza, da un particolare riconoscimento dei legami e delle relazioni sociali.

Lo sviluppo degli interventi educativi, in passato declinati per lo più sulla base di *pattern* dettati dal mondo adulto che non ponevano il bambino al centro dell'azione pedagogica, è il frutto di un lungo processo culturale, sociale, politico, morale e professionale, che culmina con una sorta di rovesciamento dei "protagonismi" educativi e con un'evoluzione democratica delle azioni formative.

A questo proposito, prendendo come riferimento le categorie storiografiche e gli autori più significativi magistralmente individuati e proposti da Evelina Scaglia nel recente volume *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*³, appare quantomeno necessario tentare di ricostruire l'intero *excursus* della pedagogia 0-3 anni, al fine di evidenziare i momenti più rilevanti della metamorfosi epistemologica della pedagogia della prima infanzia.

1. L'itinerario storiografico della pedagogia della prima infanzia dalla *paideia* greca al Medioevo

Fin dall'antichità, di fatto, l'azione pedagogica fu in realtà ben determinata, pensata e agita, nonostante spesso il bambino venisse considerato come un soggetto solo parzialmente definito, sovente confuso nel mondo degli adulti e inserito all'interno di comunità in cui non vi era spazio per i deboli e i "deformi". Partendo dal presupposto per cui le radici della storia della pedagogia occidentale sono rintracciabili nella *paideia* del Mediterraneo antico,

¹ A questo proposito, si fa riferimento al concetto di *sentimento dell'infanzia* elaborato, insieme a quello di famiglia, dallo storico francese Philippe Ariès, nel contesto della storiografia delle *Annales*.

² Cfr. F. Cambi, *Un paradigma culturale forte e articolato*, in F. Cambi, C. Di Bari, D. Sarsini (edd.), *Il mondo dell'infanzia. Dalla scoperta al mito alla relazione di cura. Autori e testi*, Milano, Apogeo, 2012, pp. 1-2.

³ E. Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, 2 voll., Roma, Edizioni Studium, 2020. In questo recente contributo, articolato in due volumi, *Dall'antichità a Comenio e Da Locke alla contemporaneità*, l'Autrice ricostruisce abilmente la storia delle teorie e delle pratiche educative alla base dello sviluppo della pedagogia 0-3 anni, al fine di individuare i parametri sociali collettivi che hanno qualificato e influenzato le azioni pedagogiche occidentali.

si può notare come la figura del bambino, in epoca classica, fosse appena accennata e solitamente inserita in una sorta di confusa «età preadulta», così come ne danno testimonianza la pluralità dei vocaboli utilizzati per identificare i bambini e le bambine⁴, e le esigue, e spesso non coeve, fonti a disposizione dell'indagine storico-educativa.

Per poter delineare i tratti distintivi dell'azione educativa tipica della *paideia* greca, il primo «contesto didattico» che può essere preso in esame è quello dell'*èpos* omerico, nel quale i tradizionali elementi educativi, fino a quel momento tramandati per lo più oralmente, risultavano essere l'esito di un'omogenea combinazione tra capacità morali e tecniche. Le gesta degli eroi narrate nelle opere di Omero si riferivano, infatti, a una cultura arcaica e a un'educazione tipicamente aristocratica, intesa come un «processo spirituale di acquisizione da parte del singolo individuo di una cultura superiore, sorta da un processo di differenziazione sociale dell'umanità»⁵.

L'etica cavalleresca delineata da Omero identificava il concetto stesso di *areté* nella figura dell'eroe, padrone del proprio *lógos*⁶ e, di fatto, i percorsi educativi possibili per gli infanti erano solamente di due tipologie: quello del futuro eroe, che fin dalla nascita doveva mostrarsi forte, moralmente saldo e superiore agli altri, e quello dell'aristocratico, che pur non essendo destinato a grandi imprese, doveva imparare ad adempiere con dovizia ai propri doveri pubblici e familiari⁷.

A testimonianza della rigidità pedagogica dell'antica Grecia risulta, inoltre, emblematico il confronto delle istanze educative proposte da Sparta, stereotipo di città guerriera, e da Atene, la prima *polis* in cui avvenne, all'incirca attorno al VI secolo a.C., il passaggio «ad una nuova *paideia* fondata sullo sviluppo di prassi, usi e consuetudini tipici della vita civile, e non più militare»⁸. L'*agoghé* spartana individuava l'impegno militare come il fulcro della socialità e, di conseguenza, anche delle relazioni educative; il fine ultimo della formazione dei cittadini risiedeva nella protezione dello Stato e nel mantenimento del precario

⁴ I termini principalmente utilizzati in greco erano *népios* per bambino piccolo, infante; *pâis* per fanciullo, ragazzo, figlio o figlia, servo; *téknon* per figlio, figlia, prole; e altre specificazioni, tra cui *bréphos* per il bambino appena nato, *paidion* per il «bambinetto» e *néos*, che invece si riferiva al giovane, non adulto (Cfr. E. Becchi, *L'antichità*, in E. Becchi, D. Julia (edd.), *Storia dell'infanzia. 1. Dall'antichità al Seicento*, Roma-Bari, Laterza, 1996, pp. 3-4).

⁵ Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 1, p. 17.

⁶ Per un approfondimento sulla pedagogia omerica, si veda in particolare il capitolo *L'educazione omerica*, in H.-I. Marrou, *Storia dell'educazione nell'antichità*, Roma, Edizioni Studium, 1966, pp. 25-37.

⁷ A testimonianza di questo duplice percorso educativo, appare emblematico rievocare la formazione di Achille, l'eroe per eccellenza, e il destino di Astianatte, figlio di Ettore e Andromaca, la cui figura sul piano del discorso pedagogico, permette anche di individuare i tratti significativi della famiglia classica a livello educativo, soprattutto in quanto «luogo natural-istituzionale di esistenza e crescita» del bambino. Per una nota specifica sul destino educativo di Astianatte si veda E. Becchi, *I bambini nella storia*, Roma-Bari, Laterza, 1994, p. 147 e pp. 150-157.

⁸ Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 1, p. 30.

equilibrio interno, pertanto, l'ideale educativo «totalitario» spartano risultava piuttosto conservatore e, soprattutto, militare⁹. Al contrario, il modello ateniese era proiettato verso la formazione del futuro uomo politico, in particolare attraverso lo sviluppo dell'eloquenza, della retorica e della cultura scritta; ad Atene, infatti, il processo di democratizzazione aveva attribuito alla dimensione collettiva una posizione centrale, per questo i figli, considerati come un bene comune dell'intera comunità, inizialmente dovevano essere accuditi in ambito domestico dalla madre e dalla balia, poi, a partire dai cinque anni, seguiti da un pedagogo (*paídion*) scelto dal padre, e infine, dai sette anni, dovevano essere avviati a una formazione «statale», di tipo civile e militare.

Successivamente, con l'avvento della Sofistica, della scuola di Isocrate e con la formulazione del pensiero filosofico di Platone e di Aristotele, si assistette a una vera e propria rivoluzione morale dell'educazione, la quale gettò le basi per lo sviluppo della cultura ellenistica, in cui mutò l'interpretazione del rapporto tra individuo e Stato. L'educazione divenne sempre più una questione pubblica e, per tale motivo, i bambini fin dalla nascita dovevano essere formati a divenire futuri cittadini; in questo scopo risiedeva l'esplicito interesse nei confronti della prima infanzia, per la formazione della quale risultava necessaria la trasmissione di modelli moralmente corretti, di buone prassi e abitudini, e di indicazioni edificanti per lo sviluppo della ragione¹⁰.

Dopo questa prima fondamentale riflessione, per ricostruire le radici del pensiero pedagogico occidentale, appare indispensabile passare alla descrizione della *humanitas* romana, che identificava anch'essa la *familia* come luogo primario e privilegiato in cui trasmettere i valori tipici del *mos maiorum*; nel contesto romano, però, il *puer* doveva essere educato alla «norma legale» e alla «tradizione culturale» già all'interno dell'ambito domestico, dapprima sotto la responsabilità materna e poi, sempre a partire dai sette anni, guidato dall'autorità paterna.

Per i romani, il bambino nel periodo della prima infanzia non era dotato di *logos*, pertanto, per un suo corretto sviluppo risultava essenziale l'applicazione di una adeguata pedagogia dell'esempio, nella quale la tradizione familiare fosse inserita nel più ampio contesto nazionale. Il *puer*, di fatto, era esclusivamente «oggetto di attenzione in funzione dello svolgimento da parte di suo padre dei

⁹ Per Sparta lo Stato rappresentava il «tutto», pertanto i suoi cittadini dovevano essere educati fin dalla prima infanzia nell'*oikos* alla solidarietà, al sacrificio e all'onore, come dei veri e propri soldati. In riferimento all'educazione spartana si veda, in particolare, la legislazione di Licurgo in Marrou, *Storia dell'educazione nell'antichità*, cit., pp. 39-52.

¹⁰ Per un approfondimento tematico sull'educazione classica, si faccia soprattutto riferimento ai testi di W. Jaeger, *Paideia. La formazione dell'uomo greco*, 3 voll., Firenze, La Nuova Italia, 1978; M. Gennari, *Dalla paideia classica alla Bildung divina*, Milano, Bompiani, 2017; e alle prime due parti del testo di Marrou, *Storia dell'educazione nell'antichità*, cit., pp. 25-304.

doveri di cittadino» e affinché assicurasse una continuità al buon nome della famiglia¹¹.

A seguito della rivoluzione “spirituale” del II secolo a.C., e all’incontro tra i modelli educativi tipici del mondo greco e romano, si rese necessaria una trasformazione culturale e formale in ambito educativo; a tal fine, il *pater familias* venne maggiormente coinvolto nella formazione del figlio e l’acquisizione dell’arte oratoria divenne il principale strumento per poter affrontare le questioni pubbliche e politiche. Pertanto, fin dalla nascita, risultava indispensabile abituare il bambino a un corretto uso del *logos* e dell’eloquenza, e a una precisa formazione morale, in modo da evitare qualsiasi forma di indulgenza, e da promuovere l’acquisizione futura delle nozioni culturali.

I riferimenti alla pedagogia dell’*exemplum* e la rivalutazione del ruolo educativo della famiglia rappresentano tratti comuni ed elementi rappresentativi, tipici anche del successivo e radicale mutamento interpretativo apportato dall’avvento del Cristianesimo.

Nell’ambito della nuova cornice antropologica e spirituale formatasi a seguito della diffusione della religione cristiana, l’analisi dell’agire “umano” di Gesù di Nazareth, ovvero il *logos* che si è fatto corpo e sangue di Cristo, consente di individuare i tratti pedagogici fondamentali del messaggio cristiano rivolto all’età evolutiva, sia richiamando gli espliciti, ma non numerosi, riferimenti al periodo della prima infanzia di Gesù – rintracciabili in particolare nei vangeli di Matteo e Luca – sia attraverso la riflessione sul rapporto instaurato tra il Figlio di Dio e i bambini, nel corso del suo magistero e della sua opera di evangelizzazione. La *paideia* cristiana attribuiva nuova dignità alle virtù infantili e, addirittura, le elevava alla condizione di requisiti fondamentali per l’innalzamento della propria moralità umana e per il raggiungimento del Regno dei Cieli. Un ruolo centrale era, quindi, conferito alla formazione della coscienza religiosa e morale del fanciullo, che per la Chiesa antica era da considerarsi come un’«educazione cristiana nel senso sacro e trascendente della parola», e che, per tale ragione, non poteva essere impartita all’interno della scuola come l’educazione profana, «ma nella Chiesa e dalla Chiesa, e d’altra parte in seno alla famiglia», all’interno della quale i genitori avevano il dovere di far partecipare i figli al «tesoro della fede» e di infondere in loro «una sana disciplina riguardo la vita morale»¹².

Riprendendo il concetto di «osmosi culturale»¹³ teorizzato da Henri-Irénée Marrou, sono ben identificabili le ragioni per cui la nascente *paideia* cristiana, inserita nel contesto dell’umanesimo ellenistico, fu in grado di dedurre gli strumenti culturali necessari alla costruzione del proprio patrimonio pedagogico,

¹¹ Cfr. Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 1, p. 65. Sul ruolo specifico dell’infanzia all’interno del contesto romano, si veda anche J.-P. Néraudau, *Il bambino nella cultura romana*, in Becchi, Julia (edd.), *Storia dell’infanzia. 1. Dall’antichità al Seicento*, cit., pp. 30-60.

¹² Marrou, *Storia dell’educazione nell’antichità*, cit., p. 411.

¹³ *Ibid.*, p. 417.

ai quali, tuttavia, aggiunse un'assoluta novità, ovvero l'interpretazione dell'educazione come un atto di amore, volto alla formazione di un individuo libero e responsabile già a partire dalla primissima infanzia¹⁴.

La nuova cultura cristiana, ricca di riferimenti e attenzioni nei confronti dei primi tempi della vita, era d'altro canto caratterizzata anche da una concezione piuttosto ambigua della natura infantile, poiché si riteneva che in essa fosse possibile rintracciare sia elementi virtuosi sia qualità negative, le quali spesso portarono a identificarla come un periodo caratterizzato dall'attribuzione di punizioni e costrizioni, inflitte a causa dei vizi o degli atteggiamenti inadeguati assunti dai bambini. Questa duplice visione dell'infanzia, o meglio dell'età non-adulta, permase fino a tutto il periodo medioevale, nel corso del quale l'individuo si trovò inserito all'interno di una comunità tipicamente feudale, sulla quale gravava sia l'*auctoritas* della Chiesa, sia la *potestas* del sovrano; in tale contesto, la *paideia* cristiana subì una trasformazione e andò sempre più a identificarsi in quella monastica, caratterizzata da una rigida attività spirituale.

A questo proposito, per poter riflettere sulle funzioni educative e assistenziali messe in atto dai monasteri, risultano essere particolarmente emblematiche le esperienze educative vissute dai bambini oblati, ovvero offerti spontaneamente ai monasteri dalle proprie famiglie di origine come un dono a Dio; l'oblazione, all'epoca, era infatti considerata come un vero atto religioso, volto ad assicurare al fanciullo la vita eterna, oltre che a garantirne la salvezza terrena¹⁵. Nel corso del tempo, inoltre, i monasteri affiancarono all'essenziale funzione spirituale e morale, anche il ruolo di centro di custodia sociale, soprattutto alla luce del loro progressivo sviluppo in qualità di luogo di assistenza e soccorso all'infanzia abbandonata e rifiutata.

La formazione dell'*habitus* spirituale offerta dall'educazione cristiana dovette nondimeno fare i conti con la parallela diffusione di una *paideia* laica che, tra il V e il X secolo, non si mostrò altrettanto "accogliente" e benevola nei confronti della prima infanzia; basti pensare, per esempio, alla portata che

¹⁴ A questo proposito si veda l'analisi e lo studio dell'interiorità dell'uomo dei Padri della Chiesa (Clemente Alessandrino, Giovanni Crisostomo, Girolamo di Stridone e Agostino) proposto da Evelina Scaglia, al fine di descrivere, con estrema dovizia, l'elaborazione dei rinnovati metodi pedagogici e la prospettiva educativa assunta dalla formazione infantile all'interno della teologia cristiana, secondo una concezione che identificava il bambino come figlio di Dio, riconosciuto nella sua interezza umana e, pertanto, dotato di qualità intellettive, morali e fisiche (cfr. Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 1, pp. 84-109).

¹⁵ Il fenomeno dell'oblazione, definito da Boswell come la forma «più umana» di abbandono infantile diffusosi nel corso dell'età medievale in Occidente, è di fatto affiancato e legato a quello certamente più antico e diffuso dell'esposizione infantile. Per un approfondimento sul tema dell'oblazione in epoca medievale, si vedano per l'appunto J. Boswell, *L'abbandono dei bambini in Europa occidentale*, trad. it. F. Olivieri, Milano, Rizzoli, 1991; M. de Jong, *In Samuel's Image. Child Oblation in the Early Medieval West*, New York, E.J. Brill, 1996; o il più recente contributo di G. Archetti, «*Sub virga magistris*». *Custodia e disciplina nell'educazione carolingia dei pueri oblati*, «Studi medievali», a. LVII, n. 2, 2016, pp. 527-582.

all'epoca raggiunsero alcune pratiche come l'infanticidio e l'aborto, le quali si diffusero soprattutto per ragioni economiche, culturali e politiche¹⁶.

In seguito, grazie alla caduta del sistema feudale e alla diffusione dell'urbanizzazione, l'attenzione nei confronti dell'infanzia mutò nuovamente prospettiva: accanto al persistere di alcune tradizionali ambivalenze, venne promossa una rinnovata sensibilità nei confronti delle classi sociali marginali e, soprattutto, dell'infanzia abbandonata, per la quale iniziarono a svilupparsi diverse forme di assistenza e tutela.

In ambito cristiano, a partire dalla rivoluzione del XI secolo, l'immagine della prima infanzia fu nuovamente riformata. Attraverso l'analisi di diverse fonti, tra cui soprattutto quelle iconografiche, divulgative e religiose, è possibile, per esempio, porre in evidenza l'importanza conferita all'epoca al sacramento del battesimo e al rapporto tra madre e figlio, in particolare alla luce delle numerose rappresentazioni del legame tra il bambino Gesù e Maria. Grazie alla rievocazione di usi e costumi tradizionali, come il sistema delle fasciature, il baliatico, le pratiche alimentari, o ancora, grazie alla descrizione di alcuni dispositivi pensati appositamente per i bambini, tra cui i primi rudimentali giocattoli, si possono inoltre esplicitare le ragioni e le caratteristiche delle azioni educative tardo medioevali, che si fanno portavoce della rinnovata concezione infantile.

2. Dalla paideia umanistica alla rivoluzione “puerocentrica” del secondo Novecento

La narrazione dell'itinerario storiografico della pedagogia della prima infanzia giunge sicuramente a un punto di svolta con la presentazione della *paideia* umanistica, con la quale l'educazione assunse sempre più un carattere liberale, grazie anche alla graduale separazione “intellettuale” tra vita infantile ed età adulta¹⁷, e all'affermarsi di un nuovo ideale antropocentrico.

Nel corso del Quattrocento, l'ambiente familiare fu posto al centro dell'azione educativa della prole, ma in una prospettiva di continuità con la

¹⁶ Sui cambiamenti culturali ed educativi avviati a partire dall'XI e XII secolo, si faccia particolare riferimento agli studi curati dai francesi Riché (*L'enfant dans le Haut Moyen Âge*, «Annales de démographie historique», vol. IX, 1973, pp. 95-98; Id., *Le scuole e l'insegnamento nell'Occidente cristiano: dalla fine del V secolo alla metà dell'XI*, Roma, Jouvence, 1984), Alexandre-Bidon e Lorcin (*Système éducatif et cultures dans l'Occident médiéval: XII-XV siècle*, Gap, Ophrys, 1998), Le Goff (*L'uomo medievale*, Roma-Bari, Laterza, 1987) e Ariès (*Padri e figli nell'Europa medievale e moderna*, 2 voll., Roma-Bari, Laterza, 1976), oltre a quelli di McLaughlin, contenuti nel fondamentale testo di L. DeMause (ed.), *Storia dell'infanzia*, Milano, Emme, 1985, pp. 93-184.

¹⁷ Cfr. E. Becchi, *Umanesimo e Rinascimento*, in Becchi, Julia (edd.), *Storia dell'infanzia*. 1. *Dall'antichità al Seicento*, cit., p. 119.

futura formazione scolastica del fanciullo; al fine di delineare i tratti tipici dell'infanzia umanistica, accanto nuovamente alle fonti iconografiche, risulta quindi fondamentale l'analisi dei precetti morali e formativi trasmessi dalla trattatistica educativa, oltre a quella dell'azione delle nascenti congregazioni religiose, particolarmente concreta e considerevole in ambito assistenziale ed educativo¹⁸.

In un periodo storico ambivalente, caratterizzato dall'aumento del fenomeno dell'esposizione infantile e dal fiorire di una nuova stagione degli *studia humanitatis*, la riflessione sulla natura propria dell'infanzia prese il via dallo sviluppo di alcune principali pratiche e metodologie educative, declinate in base alla classe sociale di origine e di appartenenza. A tal proposito, risulta cruciale il contributo offerto da alcuni fondamentali autori, i quali, attraverso una poliedrica azione culturale, riuscirono a trasmettere un nuovo impulso al dibattito educativo dell'epoca volto all'elaborazione di una *paideia* rinnovata; in primo luogo, si intende far riferimento a Leon Battista Alberti e alla sua analisi del ruolo dei genitori e della loro responsabilità educativa; di seguito, si rievoca il pensiero di Erasmo da Rotterdam, in riferimento all'educazione del principe cristiano, e quello di Juan Luis Vives, per la precettistica morale per fanciulle; infine, non si può non richiamare Michel de Montaigne, soprattutto in ordine all'educazione del gentiluomo¹⁹.

Nel corso del Cinquecento, a seguito del diffondersi della riforma protestante e del movimento di rinnovamento cattolico, il ruolo e la concezione d'infanzia assunsero una posizione principale all'interno delle questioni pedagogiche, sia in relazione alle classi popolari, sia a quelle borghesi e aristocratiche. Accanto a una crescente considerazione della dimensione ludica e dell'immaginario infantile, infatti, centrale risultava essere l'educazione religiosa del bambino, trasmessa fin dalla nascita, dapprima tramite genitori probi e onesti, o attraverso balie e nutrici anch'esse di rispettabili e nobili costumi, successivamente attraverso la formazione di onesti cittadini ben educati, posti al servizio dello Stato e della Chiesa²⁰.

Nel periodo compreso tra l'età moderna e la contemporaneità, il pensiero pedagogico si estese sul duplice piano della riflessione teorica e dell'azione pratica, e grazie al proliferare di nuove discipline, impegnate nello studio del

¹⁸ Sulla trattatistica educativa e sul contributo delle congregazioni religiose in età moderna, si veda soprattutto R. Sani, *Storia dell'educazione e delle istituzioni scolastiche nell'Italia moderna*, Milano, FrancoAngeli, 2015.

¹⁹ Per un'approfondita analisi del contributo teorico di questi quattro autori cardine, si veda Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 1, pp. 147-173.

²⁰ In riferimento alla rinnovata educazione cristiana impartita a seguito delle riforme tridentine, risulta doveroso richiamare il trattato educativo di Silvio Antoniano, ovvero i *Tre libri dell'educatione christiana dei figliuoli* (1584), commissionato dal cardinal Borromeo. In ambito protestante, al contrario, si rimanda all'elaborazione del principio metodologico universale di Comenio (*Didattica Magna*, 1628).

fenomeno educativo da più punti di vista, si arricchì dei contributi elaborati in ambito medico, psicologico ed epistemologico. Tale pedagogia rinnovata, riformulata sulla base dell'integrazione tra teoria e prassi, rispondeva alle nuove esigenze antropologiche e sociali, e si proponeva di favorire la formazione naturale e lo sviluppo armonico delle qualità morali e fisiche del bambino; per questo motivo, il concetto stesso di *physis* fu posto al centro dell'azione intellettuale e culturale rivolta alla prima infanzia.

La rivoluzione pedagogica avvenuta tra il XVII e il XVIII secolo sancì l'inizio di un percorso di potenziamento della dimensione metaempirica del bambino, che avvenne anche grazie all'elaborazione di un'educazione sempre più indiretta, impartita in contesti sempre più "puerocentrici". Nel dettaglio, partendo dai presupposti teorici elaborati da Ariès sul *sentimento dell'infanzia* e dall'*habitus* educativo settecentesco descritto dal medico Héroard, risulta fondamentale prendere in analisi la concezione del bambino offerta da John Locke, la cui opera «consente di cogliere il rapporto di interdipendenza esistente fra il processo di formalizzazione del sapere pedagogico nella piena età moderna e l'affermazione del processo di educazione individuale borghese, lontano dalle esperienze collegiali nei *seminaria nobilium* dei gesuiti e dalle *grammar schools* inglesi, ma con un richiamo diretto alla tradizione delle scuole umanistiche inglesi»²¹.

Lo studio critico della natura dell'intelletto elaborato da Locke²² poneva al centro della riflessione antropologica e pedagogica un uomo capace di farsi da solo, una sorta di evoluzione del modello di *gentleman* già proposto da Montaigne, che, grazie a metodi educativi non eccessivamente autoritari e alla valorizzazione dell'empirismo, potesse sviluppare *a-posteriori* tutte le sue capacità intellettuali e pratiche. In questo senso furono riletti, quindi, gli *habitus* morali e culturali a cui abituare i bambini fin dalla prima infanzia, e l'attenzione da rivolgere ai processi educativi miranti al disciplinamento dei desideri infantili; da ciò ne derivava, inoltre, una tipologia di educazione pratica, basata sull'imitazione di buoni e virtuosi esempi e sull'uso di metodi educativi moderati, caratterizzati dal rispetto reciproco tra adulti e bambini²³.

Agli albori dell'età dei Lumi, maggiore rilievo assunse anche l'importanza dell'educazione femminile, intesa come mezzo di conservazione dell'integrità morale ed etica dell'intera società. Le future mogli e madri, di fatto, dovevano

²¹ Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 2, pp. 20-21.

²² In relazione al pensiero di Locke si fa esplicito riferimento al suo trattato educativo più importante, ovvero *Pensieri sull'educazione*, pubblicato per la prima volta nel 1693 e più volte riedita nel corso della storia.

²³ Nel panorama del pensiero pedagogico internazionale tra Sei e Settecento un ruolo importante venne ricoperto anche da Fénelon, la cui proposta educativa si basava su una concezione di bambino come «essere in evoluzione stadiale» e sul primato dell'autoeducazione, un concetto poi ripreso dalla pedagogia contemporanea. Della produzione di Fénelon si vedano in particolare il trattato *L'éducation des filles* (1687) e il romanzo *Les Aventures de Télémaque* (1699).

essere educate fin dalla prima infanzia ai loro ruoli sociali e, in particolare, alla responsabilità educativa nei confronti della formazione della prole, in un contesto sociale di carattere sempre più borghese.

Nel corso del Settecento, la diffusione di una struttura familiare nucleare e la vera e propria «scoperta dell'infanzia», intesa come una fase dell'esistenza «con proprie dimensioni costitutive», differenti e non assimilabili a quelle dell'età adulta, resero il ruolo educativo dei genitori sempre più rilevante, sia nelle classi popolari sia in quelle alto-borghesi. La diffusione del *sentimento dell'infanzia*, in più, rese necessario un ripensamento filosofico e pedagogico delle esigenze psicologiche ed educative del periodo della prima infanzia, a favore di una crescita armonica e naturale dell'individuo all'interno della società. In questo contesto, venne ufficialmente inaugurata una nuova stagione politica ed educativa, basata su una «tensione etica» che tendeva a promuovere un'evoluzione delle teorie e delle pratiche educative; in esse risiedeva, infatti, la «razionalità pratica» in grado di guidare l'azione e lo sviluppo della persona, lontano dalle mere esposizioni teoretiche, dalle semplificazioni e dagli estremi tecnicismi.

In particolare, grazie alla pietra miliare della pedagogia settecentesca, ovvero l'*Émile ou de l'éducation* (1762) di Jean-Jacques Rousseau, il periodo della prima infanzia venne ufficialmente riconosciuto come condizione ideale in cui la *physis* umana poteva manifestarsi nella sua completa bontà e integralità, per questo motivo l'azione educativa doveva essere declinata sulle peculiari caratteristiche individuali del bambino, e pertanto personalizzata²⁴.

Alla luce di questo rinnovato quadro ideale di educazione naturale, venne potenziata la funzione educatrice della famiglia, e in particolare della madre, valorizzata da numerosi pedagogisti dell'epoca, tra cui *in primis* lo svizzero Johann Heinrich Pestalozzi, per il quale, la formazione integrale dell'individuo doveva avvenire, appunto, attraverso una madre naturalmente «amorevole», la cui pedagogia fosse in grado di coniugare, nell'ambito della nuova *Bildung* umana basata sull'esperienza, sia elementi illuministici, sia tipici del filantropismo tedesco. La teoria educativa formulata da Pestalozzi si proponeva come il risultato di una felice sintesi tra le istanze di Comenio e Rousseau, e tendeva alla promozione di un'educazione «domestica» e «secondo natura» dei fanciulli; in questo modo, l'intervento pedagogico appariva come la somma tra teorie, prassi e vita, e il ruolo materno subiva una sorta di «elevazione spirituale».

²⁴ A titolo esemplificativo e senza alcuna pretesa di esaustività, sulle teorie educative di Rousseau si vedano: C. Covato, *Jean-Jacques Rousseau. Lumi, verità e finzione autobiografica*, in Ead. (ed.), *Vizi privati e pubbliche virtù. Le verità nascoste nelle pedagogie narrate*, Milano, Guerini Scientifica, 2010, pp. 93-113; il numero monografico *Per il centenario di Rousseau (1712-2012)*, «Nuovo Bollettino CIRSE», vol. 2, 2012, pp. 11-110; G. Bertagna (ed.), *Il pedagogista Rousseau tra metafisica, etica e politica*, Brescia, La Scuola, 2014; Scaglia, *La scoperta della prima infanzia. Per una storia della pedagogia 0-3*, cit., Vol. 2, pp. 42-53.

Nel corso del Settecento, l'accordo raggiunto tra la tradizione religiosa cattolica e le istanze di modernità, a livello politico, permise lo sviluppo di una corrente cattolico-liberale in grado di porre all'attenzione dell'opinione pubblica la necessità di migliorare le condizioni morali del popolo, anche attraverso la diffusione di strategie educative e di acculturazione.

In particolare, la pedagogia del cattolicesimo risorgimentale italiano, sovente definita «pedagogia del risveglio educativo», iniziò a far proprio il concetto di progressività dell'educazione e, quindi, a promuovere un intervento educativo popolare inteso come «autoeducazione». Grazie a una maggiore apertura al confronto e agli scambi internazionali, anche in Italia vennero elaborati nuovi modelli e metodi educativi, tra cui, a buon diritto, si richiamano alla memoria quelli proposti da importanti pedagogisti provenienti dall'ambiente riformista e liberal-moderato toscano, come Raffaello Lambruschini, Gino Capponi, Antonio Rosmini e Niccolò Tommaseo²⁵.

Il processo di trasformazione sociale che investì il contesto europeo ottocentesco, insieme con l'introduzione delle donne in ambito lavorativo e con l'aumento esponenziale del fenomeno dell'esposizione infantile²⁶ – e di

²⁵ Nello specifico, Lambruschini riprese l'importanza dell'educazione familiare e del ruolo materno, già anticipato da Pestalozzi; Capponi, sulla base della lettura di Rousseau, esaltò la necessità di un'educazione sia privata sia pubblica, a fronte del diritto familiare naturale dell'esercizio educativo nei confronti dei figli, e del dovere dello Stato di uniformare l'educazione, al fine di migliorare integralmente la vita civile; Rosmini propose, in una prospettiva unitaria tra antropologia e teologia, una riflessione filosofica sulle sensazioni dell'infanzia, o meglio sul legame tra intuizione unitaria dell'essere e forza dello spirito; e infine, Tommaseo, in riferimento all'infanzia, viene ricordato soprattutto per la pratica dell'osservazione sistematica, in un orientamento romantico e in parte *pre-sperimentale*.

²⁶ Tra i lavori più significativi sul tema dell'esposizione si segnalano: M. Gorni, L. Pellegrini, *Un problema di storia sociale. L'infanzia abbandonata in Italia nel secolo XIX*, Firenze, La Nuova Italia, 1974; S. Pagano, *Gli esposti dell'Ospedale di S. Spirito nel primo Ottocento*, «Ricerche per la Storia Religiosa di Roma», vol. 3, 1979, pp. 353-392; G. Da Molin, *L'infanzia abbandonata in Italia nell'età moderna*, Bari, Università degli Studi, 1981; G. Di Bello, *Senza nome né famiglia. I bambini abbandonati nell'Ottocento*, Firenze, Manzuoli, 1989; J. Boswell, *L'abbandono dei bambini in Europa Occidentale. Demografia, diritto e morale dall'Antichità al Rinascimento*, [trad. it. Francesca Olivieri], Milano, Rizzoli, 1991; E. Sonnino, *Esposizione e mortalità degli esposti nello Stato pontificio agli inizi dell'Ottocento secondo le statistiche raccolte da Leopoldo Armaroli*, in *Enfance abandonnée et société en Europe. XIV-XX siècle. Actes du colloque international de Rome (30 et 31 janvier 1987)*, Roma, École française de Rome, 1991, pp. 1065-1096; G. Da Molin, *Nati e abbandonati. Aspetti demografici e sociali dell'infanzia abbandonata in Italia nell'età moderna*, Bari, Cacucci, 1993; G. Da Molin (ed.), *Trovatelli e balie in Italia secc. XVI-XIX*, *Atti del Convegno Infanzia abbandonata e balatico in Italia (secc. XVI-XIX)*, (Bari, 20-21 maggio 1993), Bari, Cacucci, 1994; A. Palombarini, *Gettatelli e trovatelli. I bambini abbandonati nelle Marche (XVI-XX secolo)*, Ancona, Affinità elettive, 2005; N. Terpstra, *Abandoned children of the Italian Renaissance: orphan care in Florence and Bologna*, Baltimore, The John Hopkins University Press, 2005; M. Canella, L. Dodi, F. Reggiani (edd.), *Si consegna questo figlio. L'assistenza all'infanzia abbandonata e alla maternità dalla Ca' Granda alla Provincia di Milano: 1456-1920*, Milano, Università degli Studi di Milano, Skira, 2008; F. Lomastro, F. Reggiani (edd.), *Per la storia dell'infanzia abbandonata in Europa. Tra Est e Ovest: ricerche e confronti*, Roma, Viella, 2013; F. Reggiani, *Sotto le ali della colomba: famiglie assistenziali e*

conseguenza anche del tasso di mortalità dei *progetti* –, crearono i presupposti per l'ampliamento del dibattito culturale e politico volto alla risoluzione di alcune specifiche criticità legate alla prima infanzia e all'integrità, morale e civile, dell'intera società²⁷.

Sulla scia dell'attivazione di importanti iniziative educative e non più solamente assistenziali, avviate, in particolare, nel contesto italiano – come gli asili aporiani –, e in quello anglosassone e americano, in cui si affermò la teoria pedagogica di Owen e dove si diffusero le *infant schools*, le *nurseries schools* e le *day nurseries*, grazie soprattutto all'opera di Wilderspin²⁸, l'indagine dei lineamenti dell'educazione infantile ottocentesca fornisce un quadro epistemologico caratterizzato da una maggiore attenzione psico-pedagogica a tutte le “dimensioni” del bambino, da quella sensoriale e morale, fino a quella psico-fisica. Accanto al proliferare delle istituzioni rivolte specificatamente alla prima infanzia e al sostegno materno, infatti, si erano ampliati altresì il dibattito e le riflessioni “scientifiche” sull'educabilità dei neonati e sul ruolo centrale dei sensi nell'evoluzione del bambino.

A tal proposito, le prime fondamentali teorie da prendere in analisi sono quelle di Fröbel, per il quale l'educazione assumeva un compito “liberatore”, in quanto consentiva lo sviluppo delle capacità creative del bambino. L'esaltazione del *ludus*, l'attività che permetteva al fanciullo di manifestare la propria personalità e di cogliere in maniera intuitiva l'essenza della realtà e i principi immanenti del divenire naturale, insieme con la rivalutazione del ruolo educativo della donna e con la profonda conoscenza dei paradigmi dello sviluppo naturale infantile, costituirono i presupposti della diffusione dei *Kindergarten* in Germania. I giardini d'infanzia rappresentavano un luogo di educazione ideale, rivolto a tutti i bambini, indipendentemente dal ceto sociale di appartenenza, in cui, grazie a un sistema di continuità, era favorito lo sviluppo sensoriale, psicomotorio, empirico e relazionale dei bambini tra 0 e 6 anni.

Un ulteriore e fondamentale passaggio nella storia della pedagogia della prima infanzia europea è sicuramente rappresentato dalla diffusione del modello francese di *crèche*, elaborato dal politico e filantropo Firmin Marbeau²⁹, con

relazioni di genere a Milano dall'età moderna alla Restaurazione, Roma, Viella, 2014.

²⁷ Sullo sviluppo delle istituzioni per la prima infanzia si faccia particolare riferimento al testo di D. Caroli, *Per una storia dell'asilo nido in Europa tra Otto e Novecento*, Milano, FrancoAngeli, 2016.

²⁸ Per una ricostruzione della concezione di infanzia nel corso dell'Ottocento, e sulle principali iniziative internazionali, si veda E. Becchi, *L'Ottocento*, in E. Becchi, D. Julia (edd.), *Storia dell'infanzia. 2. Dal Settecento a oggi*, Roma-Bari, Laterza, 1996, pp. 132-206.

²⁹ Sul modello di istituto assistenziale elaborato da Marbeau, si vedano: F. Marbeau, *De crèches, ou Moyen de diminuer la misère en augmentant la population*, 3ª ed., Parigi, Comptoir des imprimeurs-unis, 1845; G. Sacchi, *Sulla fondazione di speciali ricoveri per i bambini lattanti. Memoria di Giuseppe Sacchi*, Milano, Società degli editori degli Annali universali delle Scienze e dell'Industria, 1848; e il più recente, C. Bouve, *L'utopie des crèches françaises au XIX^e siècle: un pari sur l'enfant pauvre. Essai socio-historique*, Berne, Peter Lang, 2010.

l'intento di arginare il problema dell'abbandono e della mortalità infantile e di incentivare l'uso dell'allattamento materno. Questa nuova tipologia di istituzione, di fatto, si proponeva di colmare la quasi totale assenza di strutture dedicate precipuamente alla prima infanzia, e di favorire la riflessione sulla necessità di riscoprire il *sentimento* materno, anche attraverso la diffusione di nozioni igieniche e di puericultura, e dei valori cristiani della famiglia, in un'ottica nazionale di solidarietà e mutuo aiuto.

In Italia tale modello francese fu principalmente *ri*-proposto ed esteso grazie all'opera di Giuseppe Sacchi, responsabile del progetto di apertura nel 1850 di un *Ricovero per bambini lattanti e slattati* a Milano³⁰, i cui scopi erano pienamente in linea con quelli già individuati da Marbeau; così come avvenne in Francia, anche nella penisola italiana la diffusione dei presepi diede il via a una serie di polemiche, legate per lo più ad ambiti politici e intellettuali conservatori e tradizionalisti, che ritenevano questa tipologia di strutture dannose per il mantenimento dell'integrità familiare e a causa della diffusione di malattie.

Sulla base dell'esaltazione dello sviluppo psico-fisico del bambino fin dai primi mesi di vita e di un metodo educativo graduale, oggettivo e intuitivo, Sacchi introdusse un altro concetto fondamentale in ambito educativo, ovvero la necessità di fornire una formazione adeguata al personale impiegato in questa "nuova" tipologia di servizi educativi e assistenziali; bisogno che venne successivamente ripreso, con maggior enfasi, nel corso del Novecento, e a seguito della progressiva statalizzazione dell'amministrazione delle strutture dedicate alla prima infanzia³¹.

La rinnovata visione "positiva" promossa nei confronti della natura infantile, e l'importanza del ruolo delle educatrici nel dar forma alle aspirazioni dei bambini, crearono un rapporto di interdipendenza tra il processo di modernizzazione sociale, la funzione educativa della famiglia e l'attivismo scolastico, che in seguito alla «rivoluzione copernicana» di inizio Novecento, si tradusse in un radicale rovesciamento del ruolo dei protagonisti della relazione educativa.

Il *turning point* di inizio secolo scorso, causato dall'introduzione di una visione "positiva" della natura infantile e dal progressivo sviluppo delle professionalità educative, sancisce l'avvio di quello che Ellen Key³² definiva,

³⁰ Sulla storia dell'istituto di Milano si veda D. Boati, R. Cavallo, G. Uberti (edd.), *Una vita per l'infanzia. Il Pio Istituto di Maternità di Milano: una esperienza di 150 anni*, Milano, FrancoAngeli, 2017.

³¹ Il processo di statalizzazione amministrativa prese il via, in particolare, grazie all'emanazione della legge Crispi del 17 luglio 1890, a seguito della quale furono riorganizzati sia gli istituti assistenziali e ospedalieri, sia gli interventi di beneficenza, in quanto con essa si sancì che lo Stato avesse il diritto e il dovere di farsi carico della gestione delle Istituzioni di pubblica beneficenza, ovvero di quelle strutture precedentemente denominate Opere pie.

³² «Alla base della prospettiva etico-genetica» proposta dalla Key vi era il preciso «intento di conciliare le ragioni individuali del privato con quelle della società e, in senso più largo, di tutta la specie umana», pertanto, secondo la sua concezione tutti avevano sia il diritto sia il

per l'appunto, il «secolo dei fanciulli», nel corso del quale l'infanzia viene posta al centro della riflessione pubblica e privata, anche sulla base di una rinnovata sensibilità e «autorità» genitoriale, e della promozione di interventi educativi partecipativi e rispettosi della spontaneità «naturale» del bambino.

L'«educazione nuova» proposta nel corso del Novecento prende avvio a partire dalle riflessioni filosofiche elaborate da John Dewey nell'ambito della *progressive education* e della preparazione delle nuove generazioni alla società democratica, le quali consentivano di verificare come fin dalla nascita, grazie alla dinamicità dell'esperienza individuale, i processi educativi fossero in realtà il frutto della compenetrazione dell'intelligenza umana nelle modalità dell'azione pratica³³.

Una fondamentale esemplificazione della formulazione teorico-pratica della pedagogia contemporanea certamente è riscontrabile anche nella revisione del ruolo educativo dell'adulto proposta da Maria Montessori, la quale, attraverso un radicale mutamento dei paradigmi antropologici ed educativi, avviò un processo di riconoscimento del bambino come fautore della propria personalità e del proprio sviluppo. L'acquisizione dell'autonomia e la crescita della vita psichica infantile, per la Montessori, dovevano essere scanditi da processi gradualisti, organizzati «su misura» per i bambini: attraverso l'uso di un materiale didattico analitico e alle «facilitazioni» proposte dagli educatori, infatti, l'ambiente montessoriano si proponeva di promuovere un pieno sviluppo spirituale, intellettuale e fisico del bambino, ispirato al principio della libertà e al riconoscimento della vera natura infantile³⁴.

dovere di apprendere, ognuno «seguendo il ritmo infinito di un'inesausta perfezionabilità, dato che ogni antropologia che avesse avuto la pretesa di definire la cifra ontologica degli esseri umani si mostrava manifestamente infondata». La condizione più nobile ed elevata per la crescita e lo sviluppo dell'individuo era rappresentata dall'amore, in quanto esso consentiva di trascendere le polarità conflittuali che intercorrevano tra la persona e la società (cfr. T. Pironi, *La diffusione del Secolo in Italia*, in E. Key, *Il secolo del bambino*, ed. it. a cura di T. Pironi e L. Ceccarelli, Bergamo, Junior, 2019, p. 12).

³³ Sul pensiero di Dewey, nella sterminata bibliografia, in particolare, si vedano: J.S. Bruner, *Dopo Dewey: il processo di apprendimento nelle due culture*, Roma, Armando, 1964; L. Bellatalla, *John Dewey e la cultura italiana nel Novecento*, Pisa, ETS, 1999; T. Pezzano, *L'assoluto in John Dewey: alle origini della comunità democratica educante*, Roma, Armando, 2007; L. Todaro, *Teoria dell'educazione e naturalismo culturale in John Dewey*, in Id., *Formazione e poiesis dell'umano: Dewey, Frye, Bruner*, Pisa, ETS, 2011; E. Frauenfelder, M. Striano, S. Oliviero (edd.), *Il pensiero di John Dewey tra psicologia, filosofia, pedagogia: prospettive interdisciplinari*, Napoli, Fridericiana editrice universitaria, 2013; M. Striano, *Per una teoria educativa dell'indagine: riflessioni pedagogiche sulla Logica di John Dewey*, Lecce-Rovato, Pensa Multimedia, 2015; J. Dewey, *Pedagogia, scuola e democrazia*, ed. it. a cura di A. Mariuzzo, Brescia, La Scuola, 2016; Id., *Scuola e società*, ed. it. a cura di F. Borruso, Roma, Edizioni conoscenza, 2018.

³⁴ Sul metodo montessoriano si vedano l'edizione critica a cura dell'Istituto superiore di ricerca e formazione dell'Opera nazionale Montessori di M. Montessori, *Il Metodo della Pedagogia Scientifica applicato all'educazione infantile nelle Case dei bambini*, Roma, Opera Nazionale Montessori, 2000; e quanto proposto in T. Pironi, *La Casa dei bambini di Maria Montessori*, in Ead., *Percorsi di pedagogia al femminile. Dall'unità d'Italia al secondo dopoguerra*, Roma,

La prosecuzione dell'attività montessoriana – grazie principalmente all'opera di Adele Costa Gnocchi – e lo sviluppo della psicopedagogia dell'infanzia, promossa inizialmente sulla base degli studi elaborati da Piaget e Claparède, e poi declinata in modo più specifico sui neonati, costituiscono le radici dell'evoluzione delle proposte pedagogiche del secondo Novecento, che pionieristicamente permettono di rilevare i tratti di due principi basilari, derivanti dall'intero processo di trasformazione e perfezionamento pedagogico del secolo scorso, ovvero il riconoscimento e il rispetto della personalità originale e complessa di ogni bambino fin dalla nascita, e la «finitezza dell'intervento educativo» di fronte alla manifestazione della *physis* infantile, all'interno del processo personale di auto-educazione.

I vissuti e le rappresentazioni dell'infanzia sono, pertanto, compresi all'interno delle strutture sociali delle singole comunità di interesse, che nel corso della storia subiscono continue trasformazioni, e sono il frutto di condizionamenti culturali, politici, morali e pedagogici. Il corredo delle esperienze vissute nel corso della prima infanzia rappresenta, tuttavia, un bagaglio culturale dal valore inestimabile, frutto di un processo continuo e naturale di apprendimento, che deve essere costantemente arricchito e tutelato; di conseguenza, alla luce delle nuove istanze pedagogiche elaborate a partire dal secolo scorso, la relazione di *cura*, intesa come riconoscimento e accoglienza delle peculiarità dei soggetti coinvolti nella relazione, si è evoluta implicando un maggiore coinvolgimento emotivo rispetto al passato, e una fondamentale predisposizione all'ascolto, al fine di focalizzare e realizzare gli obiettivi dell'azione educativa, in una prospettiva inclusiva, accogliente e partecipativa.

3. Riflessioni per un ampliamento della ricerca storico-educativa sulla prima infanzia

Nel corso dell'ultimo ventennio le attenzioni e le riflessioni sul mondo dell'infanzia hanno registrato un notevole arricchimento, in virtù dello sviluppo di un dibattito “puerocentrico” a livello sociale, pedagogico e legislativo, attraverso la pubblicazione di alcuni autorevoli lavori sul tema³⁵ e grazie alla periodica elaborazione, da parte soprattutto di grandi organizzazioni internazionali, di convenzioni e dichiarazioni dedicate alla tutela dell'infanzia e dell'adolescenza³⁶.

Carocci, 2014, pp. 64-87.

³⁵ A titolo esemplificativo e senza alcuna pretesa di esaustività, si rimanda al recente lavoro di M. Gecchele, S. Polenghi, P. Dal Toso (edd.), *Il Novecento: il secolo del bambino?*, Bergamo, edizioni Junior, 2017.

³⁶ Tra di esse, degna di nota è sicuramente la Convenzione ONU sui diritti dell'infanzia e dell'adolescenza, reperibile al link: <<https://www.unicef.it/convenzione-diritti-infanzia/>> (ultimo

In ambito nazionale, il recente apporto del Decreto legislativo 65 del 2017, relativo al Sistema integrato 0-6³⁷, e l'introduzione – dal 2019/2020 – del vincolo della laurea in Scienze dell'educazione o in Scienze della formazione primaria, per poter accedere al ruolo di educatore nei servizi per la prima infanzia, hanno inoltre attribuito nuovo valore all'interesse rivolto al percorso di formazione dei “professionisti” dell'educazione, così come, lo sviluppo dell'*Early Childhood Education and Care*³⁸ e il consolidamento delle relazioni educative hanno contribuito alla creazione di interventi educativi sempre più personalizzati e partecipativi.

L'attuale rivendicazione di una maggiore autorità promossa dalla pedagogia nell'ambito delle scienze umane, e la maturazione di una sua reale autonomia identitaria, così come il conseguente processo di rinnovamento e potenziamento dei servizi educativi sono, tuttavia, ancorati a una profonda revisione epistemologica, morfologica e storiografica dei termini, delle metodologie e dei sistemi formativi legati all'età evolutiva, la quale, a sua volta, rende necessaria un'indagine analitica dei paradigmi antropologici e delle concezioni pedagogiche sull'infanzia, alternatesi nel corso della storia.

A questo proposito, facendo eco all'osservazione di Enzo Catarsi secondo il quale «la storia dell'infanzia e la sua individuazione come *oggetto* storiografico costituiscono una acquisizione recente della nostra cultura»³⁹, e sulla scia della rinnovata stagione storico-educativa inaugurata nel corso degli anni Sessanta del Novecento da Philippe Ariès e dalla storiografia delle *Annales*, oggi appare quanto mai importante e necessario dare ulteriore impulso alle riflessioni sul tema dell'infanzia, o meglio delle *infanzie*, soprattutto alla luce della rivalutazione e della valorizzazione di fonti in passato considerate per lo più marginali. L'iconografia, l'abbigliamento infantile, i giocattoli e i giochi, la memorialistica, la letteratura per l'infanzia, l'arredo e la stampa illustrata per bambini, si configurano come fonti ormai indispensabili per la ricerca storico-pedagogica, che, allo stato attuale, si propone di riformulare l'indagine sui processi educativi e culturali, e di avviare una rinnovata analisi critica

accesso: 21.01.2021).

³⁷ Si fa qui riferimento al Sistema integrato di educazione e di istruzione promosso dal MIUR, volto a garantire a tutte le bambine e i bambini, dalla nascita ai 6 anni, pari opportunità per lo sviluppo delle proprie potenzialità di relazione, autonomia, creatività e apprendimento, al fine di superare qualsiasi disuguaglianza territoriale, economica, etnica e culturale. Per un approfondimento su tale tematica si rimanda ai link: <<https://www.miur.gov.it/sistema-integrato-0-6>> e <<https://www.normattiva.it/uri-res/N2Ls?urn:nir:stato:decreto.legislativo:2017-04-13;65!vig=>>> (ultimo accesso: 21.02.2021).

³⁸ Sul sito ufficiale della Commissione europea è possibile trovare una sezione a esso dedicata: <https://ec.europa.eu/education/policies/early-childhood-education-and-care_it> (ultimo accesso: 21.01.2021).

³⁹ E. Catarsi, *L'infanzia nell'Italia unita. Riflessioni metodologiche e prospettive di ricerca*, in A.M. Bernardinis, E. Bosna, F. Cambi, E. Catarsi, L. Trisciuzzi, *Storiografia dell'Infanzia. Problemi e metodi*, Ferrara, Biblioteca del Bollettino CIRSE, 1991, pp. 49-71.

degli immaginari infantili, lontana dai tradizionali riduzionismi teorici e vòlta all'affermazione delle peculiarità dei singoli soggetti implicati nelle relazioni educative.

Nell'ambito specifico della storiografia italiana, nonostante negli ultimi anni siano stati promossi studi piuttosto originali⁴⁰, il prevalere fino agli anni Settanta del Novecento di una ricerca prettamente "idealistica", di matrice etico-politica e di stampo hegeliano, ha causato un grave ritardo nella maturazione della riflessione sulle pratiche educative dedicate alla prima infanzia, che richiede al contrario un approccio maggiormente empirico, caratterizzato, inoltre, dall'acquisizione degli studi internazionali sul tema e dal confronto tra le conoscenze elaborate da studiosi di storia sociale e politica, oltre che ovviamente di pedagogia.

Come opportunamente osservato da Roberto Sani in un suo recente contributo, tra i vari fattori che hanno provocato tale rallentamento nella ricostruzione storiografica sull'infanzia e sull'educazione infantile in ambito nazionale, sono sicuramente da annoverare anche la diffusione di un «approccio per 'modelli'», comune a numerose ricerche promosse negli ultimi decenni, che si pongono come il risultato delle generali concezioni socio-economiche e classiste della società, oltre alla scarsità di studi organici che approfondiscano, con dovizia "locale", il ruolo egemone della Chiesa nel settore assistenziale ed educativo, con particolare riferimento alla prima infanzia⁴¹. Un'analisi dettagliata dell'operato della Chiesa si rende necessaria rispetto al fine di ricostruire alcuni importanti e radicati *habitus* pedagogici, che hanno segnato la tradizione educativa della penisola. La Chiesa, infatti, in passato ha agito in profondità in ambito educativo, promuovendo una visione dell'uomo – e quindi dell'infanzia – caratterizzata da un'intima sensibilità etico-religiosa; in particolare, la presenza di un'azione educativa religiosa così forte, specialmente nelle zone rurali italiane, a partire dall'Ottocento ha causato lo sviluppo di movimenti sociali cattolici, che si alimentavano di valori solidaristici e

⁴⁰ A titolo esemplificativo e senza pretesa di esaustività, si vedano a riguardo: D. Bertoni Jovine, *L'alienazione dell'infanzia*, Roma, Editori Riuniti, 1963; L. Trisciuzzi, *La scoperta dell'infanzia*, Firenze, Le Monnier, 1976; E. Becchi (ed.), *Il bambino sociale. Privatizzazione e deprivatizzazione dell'infanzia*, Milano, Feltrinelli, 1979; Ead., *Storia dell'educazione*, Scandicci, La Nuova Italia, 1987; M.C. Giuntella, I. Nardi (edd.), *Il bambino nella storia*, Napoli, Edizioni scientifiche italiane, 1993; C. Covato, S. Ulivieri (edd.), *Itinerari nella storia dell'infanzia. Bambine e bambini, modelli pedagogici e stili educativi*, Milano, Unicopli, 2001; M. Ferrari (ed.), *I bambini di una volta. Problemi di metodo: studi per Egle Becchi*, Milano, FrancoAngeli, 2006; Cambi, Di Bari, Sarsini (edd.), *Il mondo dell'infanzia. Dalla scoperta al mito alla relazione di cura. Autori e testi*, cit.

⁴¹ R. Sani, *For a history of childhood and of his education in contemporary Italy. Interpretations and perspectives of research / Per una storia dell'infanzia e della sua educazione nell'Italia contemporanea. Interpretazioni e prospettive di ricerca*, «Cadernos de História da Educação», vol. 15, n. 2, 2016, pp. 808-862.

cooperativi, e che certamente gettarono le basi per la crescita, in termini moderni, delle sensibilità civili, educative e culturali delle popolazioni agricole.

L'individuazione degli elementi cardine teorici ed epistemologici su cui si basa la genealogia e la morfologia dell'educazione e della formazione occidentale, inoltre, non può prescindere dalla «saldatura» tra l'immaginario dell'infanzia, elaborato principalmente dagli adulti e dai contesti di riferimento, con i comportamenti *agiti* dalle società nei confronti dei bambini. La “zona d'ombra” in cui sovente avviene un discostamento tra teoria e prassi nell'azione educativa costituisce, di fatto, il luogo primario in cui operare e concentrare le future riflessioni storico-pedagogiche, alla luce delle attuali prospettive di ricerca e della rivoluzione “puerocentrica” che ha investito l'ambito educativo.

Il carattere “evasivo” e complesso delle questioni affrontate, che spesso si pongono anche in una zona di confine e di “conflitto” *inter* e *intra*-disciplinare, ha non di rado determinato, a livello storiografico, l'elaborazione di contributi perlopiù descrittivi, di cui risulta difficile individuare il quadro concettuale di riferimento, con il rischio, tra l'altro, di intercorrere in «forzature interpretative» o troppo “qualunquiste”.

Conclusioni

La storia della prima infanzia, dunque, non può limitarsi all'indagine dei luoghi e dei servizi educativi, ma deve necessariamente aprirsi all'osservazione e alla riflessione sulla complessità dei vissuti originali dei bambini, influenzati da condizionamenti sociali, culturali e di genere, e dai cambiamenti epistemologici e metodologici dello stesso intervento educativo. La ricostruzione storica dell'itinerario del farsi del pensiero pedagogico, allo stato attuale pertanto, deve innanzitutto fare i conti con la “qualità” delle fonti a sua disposizione, e deve promuovere una rilettura critica delle stesse, al fine di far emergere le condizioni e le concezioni *reali* delle *infanzie*⁴², e di eliminare definitivamente quel novero di «silenzi»⁴³, che a lungo hanno saturato il mondo dell'infanzia, in favore di

⁴² L'elaborazione dell'identità infantile non può prescindere dalla dimensione affettiva ed emozionale, per questo, accanto all'indagine teorica della cultura ufficiale, risulta altresì fondamentale quella delle realtà storiche che contraddistinsero la vita sociale dei bambini. In particolare, in relazione al concetto di *infanzie*, e su quello ad esso strettamente legato delle *pedagogie narrate*, si vedano i lavori di: C. Covato (ed.), *Metamorfosi dell'identità. Per una storia delle pedagogie narrate*, Milano, Guerini Scientifica, 2006; Ead. (ed.), *Vizi privati e pubbliche virtù. Le verità nascoste nelle pedagogie narrate*, cit.; F. Borruso, L. Cantatore, C. Covato (edd.), *L'educazione sentimentale. Vita e norme nelle pedagogie narrate*, Milano, Guerini Scientifica, 2014; e il recente F. Borruso, *Infanzie. Percorsi storico-educativi fra immaginario e realtà*, Milano, FrancoAngeli, 2019.

⁴³ Su questa tematica si veda soprattutto F. Cambi, S. Ulivieri (edd.), *I silenzi nell'educazione. Studi storico-pedagogici*, Firenze, La Nuova Italia, 1994.

una restaurazione autentica dei profili personali dei bambini e delle bambine, e della qualificazione pedagogica delle professionalità educative, destinate, a loro volta, alla promozione di azioni educative concrete, accoglienti, coerenti e, in particolar modo, inclusive.

Notices / Recensioni

Notices

Recensioni

Anna Ascenzi, *Il fascismo e la mobilitazione della gioventù italiana all'estero. Ideologia e propaganda nei periodici per ragazzi*, Milano, FrancoAngeli, 2020, 88 pp.

Le fascisme avait créé des Faisceaux à l'étranger pour endoctriner les émigrés italiens et en faire les agents de transmission de son idéologie. Ces faisceaux étaient issus de la transformation de l'association irrédentiste «Trento e Trieste» de Giovanni Giuriati en une «Lega italiana per la tutela degli interessi nazionali», elle-même devenue les «Fasci italiani all'estero» en 1923. L'action de ces faisceaux s'exerçait dans tous les pays où vivaient des émigrés italiens, et plus particulièrement aux Etats Unis et en Argentine. Dans un premier temps, Mussolini les avait multipliés pour affirmer la présence du fascisme parmi les Italiens expatriés; mais leur prosélytisme était souvent contrarié par un corps diplomatique italien qui restait étranger au fascisme. Il fallut attendre une loi de 1927 pour que le ministère des Affaires Etran-

gères fût suffisamment fascisé, en partie grâce à Dino Grandi (Francesco Lefebvre D'Ovidio, *Dino Grandi, la «carriera» e la fascistizzazione del ministero degli Esteri*, «Nuova Rivista Storica», vol. 2, 2012, pp. 455-478). A la différence de l'*Opera Nazionale Balilla* (O.N.B.), l'organisation de jeunesse fasciste présidée par Renato Ricci qui dépendait du ministère de l'Education nationale, les Faisceaux italiens à l'étranger relevaient directement du Parti National Fasciste (P.N.F.). La différence était importante car l'O.N.B. bénéficiait d'un encadrement en partie formé d'enseignants (en général des instituteurs), alors que les Faisceaux à l'étranger dépendaient de l'administration du parti.

Promu secrétaire général des Faisceaux à l'étranger en janvier 1928, Piero Parini devait sa carrière diplomatique à Dino Grandi qui devait accéder l'année suivante au ministère des Affaires Etrangères. Il chargea Giuseppe Fanciulli de créer un journal capable d'entretenir parmi les jeunes italiens vivant à l'étranger un

sentiment d'*italianité*, de cultiver l'amour du duce et l'aspiration à un grand destin pour la patrie. Fanciulli avait collaboré avant la Grande guerre au *Giornalino della Domenica* de Luigi Bertelli (*Vamba*) une publication pour la jeunesse très prise entre 1906 et 1924. La guerre avait ravivé la foi catholique de Fanciulli et durci son nationalisme. Ses ouvrages des années 1920 mettaient en scène un peuple italien pénétré des vertus de la nation. L'auteur avait adhéré au fascisme et il s'était mis à son service dans la presse écrite et radio-phonique en faisant l'éloge du régime. Son journal «Aquilotti d'Italia» était destiné à devenir le principal instrument de pénétration fasciste auprès des jeunes générations vivant dans les communautés italiennes à l'étranger. Anna Ascenzi retrace l'histoire de ce magazine. Son fondateur Giuseppe Fanelli venait de publier une «Letteratura per l'infanzia» (1926) et un manuel scolaire «Gloria d'Italia. Libro per la gioventù italiana sotto ogni cielo» (1929) très apprécié par les Italiens vivant à l'étranger. «Aquilotti d'Italia» comptait de nombreux auteurs d'ouvrages italiens pour la jeunesse parmi ses rédacteurs. Il s'adressait aux enfants de tous âges avec des récits d'aventures, mais aussi en relatant des épisodes historiques romancés dans un sens patriotique. Les *nouvelles* destinées aux filles exaltaient les vertus féminines. Des reportages décrivaient les villes italiennes et les grands monuments de la péninsule, s'attachant aussi à faire revivre les traditions populaires. Chaque numéro s'ouvrait sur un éditorial de Giuseppe Fanelli qui insistait sur le rôle des jeunes Italiens vivant à l'étranger et sur l'importance de la «leva» fasciste qui sanctionnait le passage de l'enfance à l'adolescence, puis à l'âge adulte dans une série de rites initiatiques. Une rubrique des *Correspondances* permettait d'esquisser le portrait d'un «lecteur idéal» imbu des qualités propres à la

jeunesse mussolinienne, ce qui accentuait le caractère patriotique et fasciste du journal. Toutefois, «Aquilotti d'Italia» déçut ses promoteurs par le faible nombre de ses abonnés (un millier seulement) et par sa dimension littéraire qui lui interdisait d'être vraiment un organe de propagande. Il fut supprimé en 1930 et remplacé l'année suivante par «Il Tamburino della giovinezza italiana all'estero» qui parut jusqu'à la chute du régime fasciste le 25 juillet 1943.

Au début des années 1930, le parti fasciste s'inquiétait du retard de la fascisation de la jeunesse et ne ménageait pas ses critiques à l'O.N.B.; mais grâce à l'action menée par son secrétaire Giovanni Giuriati, il réussit à contrôler la tranche d'âge de 18 à 21 ans, en l'enrôlant dans les Faisceaux Juvéniles de Combat, une organisation de jeunesse dirigée par Carlo Scorza. La rédaction du «Tamburino» portait les marques de ce durcissement. Elle n'était plus composée que de journalistes fascistes ou de fonctionnaires du parti et les rubriques du journal visaient à initier les jeunes lecteurs à penser et à agir «italiennement». Certes, le périodique publiait des textes de l'écrivain Giovanni Comisso qui évoquaient les souvenirs d'émigrés frioulains et à partir de 1934 il s'adaptait à l'évolution de la littérature pour la jeunesse de l'époque en se doublant d'un mensuel de bandes dessinées; mais il diffusait l'idéologie fasciste de façon plus ouverte que «Aquilotti d'Italia». Un éditorial était consacré à l'idéal de «l'Italien nouveau» dans le plus pur esprit fasciste, selon les enseignements du duce. Le journal insistait sur le sentiment d'appartenance à la nation italienne pour inciter les émigrés à résister à l'assimilation dans leur pays d'accueil. Parmi les principales réalisations du régime, il faisait une place particulière aux raids transatlantiques d'Italo Balbo. Il véhiculait le culte du duce, l'homme du Destin, protagoniste de la renaissance nationale.

A partir de 1935, une nouvelle direction et une rédaction renouvelée donnaient au journal une ligne politique conforme à celle d'une puissance coloniale. Parmi les nouvelles rubriques figuraient l'Histoire de l'Abyssinie, la pénétration militaire italienne en Ethiopie et la fondation de l'Empire. La conquête italienne était présentée comme le triomphe de la civilisation dans un pays barbare demeuré à l'état féodal. Des récits d'aventures engageaient désormais de jeunes Italiens dans des entreprises héroïques au service de la patrie. En 1937, l'O.N.B. fut remplacée par la «Gioventù Italiana del Littorio» qui dépendait directement du parti. Il en résulta un durcissement de la formation fasciste de la jeunesse et sa militarisation. Le journal devint «Il Tamburino della gioventù italiana del littorio» portant en exergue la formule musolinienne «Croire-Obéir-Combattre». Pendant la «non belligérance» (septembre 1939-juin 1940), les textes littéraires furent sensiblement réduits sans faire place pour autant aux événements militaires de la «Drôle de guerre»; mais des personnalités fascistes de premier plan comme Ezio Maria Gray firent leur entrée dans la rédaction ainsi que la romancière Grazia Deledda, un prix Nobel de littérature qui était très proche du régime fasciste. «Il Tamburino» se contentait de compte rendu de manifestations sportives de la jeunesse et multipliait les apologies du duc. L'entrée en guerre de juin 1940 fut justifiée par les arguments fascistes habituels et «Il Tamburino» devint un simple organe de propagande. A partir de 1942, l'influence des recommandations du ministère de la Culture populaire d'Alessandro Pavolini, incita le journal à abandonner son ton martial triomphant pour celui du recueillement et des prières.

L'ouvrage d'Anna Ascenzi n'est pas seulement un livre sur la littérature pour la jeunesse. Il retrace fidèlement une par-

tie de l'itinéraire du régime fasciste à travers deux journaux destinés à la jeunesse italienne vivant à l'étranger. Il illustre le passage progressif d'une éducation patriotique et nationaliste au lendemain de la Grande guerre à un endoctrinement fasciste pur et simple.

Michel Ostenc

Settecento pedagogico e riformatore, introduzione e cura di Roberto Sani, Roma, Edizioni Conoscenza, 2019, 230 pp.

L'ouvrage collectif préfacé par Roberto Sani brosse un tableau très significatif de l'instruction dans les Etats italiens au XVIII^e siècle et décrit les politiques du despotisme éclairé dans la péninsule. Le livre évoque par ailleurs les projets de réforme de l'éducation conçus par les grands intellectuels italiens de l'époque.

Les réformes scolaires de Victor Emmanuel II dans le royaume de Sardaigne s'inscrivaient dans la politique absolutiste du souverain. Le projet de l'écrivain Scipione Maffei figurait parmi ceux qui concernaient l'université de Turin. L'auteur était célèbre dans toute l'Europe, docteur d'Oxford et membre des académies de Paris, Londres et Berlin. Son *Parere sul migliore ordinamento della R. Università di Torino* multipliait les disciplines enseignées avec les Langues, l'Histoire, les Mathématiques, la Philosophie, la Médecine, le Droit et la Théologie. Les enseignements littéraires devaient privilégier les «Lettres toscanes» ainsi désignées comme celles de l'Italie. La rhétorique était remplacée par les littératures latine, grecque, hébraïque et arabe. Les études philosophiques et scientifiques devaient s'affranchir de l'emprise aristotélécienne. Des enseignements théoriques et pratiques étaient enfin créés en Mécanique et en Architecture. Le pro-

jet de Scipione Maffei fut écarté au profit de celui du juriste sicilien Francesco D'Aguirre qui était plus mesuré dans ses réformes. *Della fondazione e ristabilimento degli studi generali in Torino* concernait la vieille organisation didactique médiévale et maintenait l'orientation aristotélicienne et thomiste des études de philosophie morale et de théologie. Les *Constitutions* divisaient l'université de Turin en 4 Facultés: Droit, Théologie, Médecine et Arts. Cette dernière dispensait les disciplines littéraires et scientifiques, sans prévoir d'ouverture sur la langue italienne. La Philosophie restait soumise aux règles du thomisme et les activités didactiques et scientifiques étaient strictement contrôlées. Les *Constitutions* de 1829 étaient plus libérales dans l'enseignement secondaire, un domaine réservé au monopole des ordres religieux, et notamment des Jésuites. Elles prévoyaient la création de 36 écoles royales placées sous la surveillance d'un Magistrat de la Réforme. Le *Collegio delle Province* ouvert à une centaine de bons élèves issus de milieux pauvres, figurait parmi les fondations les plus innovantes; mais, avec l'avènement de Charles Emmanuel III (1730), et contrairement aux nouveautés introduites par les Lumières dans d'autres Etats de la péninsule, l'ère des réformes était terminée dans le royaume de Sardaigne.

La République de Venise ne connut pas de despotisme éclairé. L'écrivain Gasparo Gozzi conçut en vain des projets de réforme de l'Université de Padoue ainsi que de l'enseignement pré universitaire. Dans son essai *Sulla riforma degli studi*, on sentait l'influence humaniste du *De disciplinis* et du *De ratione studii puerilis* rédigés par le précepteur de Marie Tudor Juan Luis Vives, et aussi celle de John Locke. Gozzi s'inspirait surtout du «Traité du choix et de la méthode des études» de l'abbé Claude Fleury, l'adjoint de Fénelon

et sous précepteur des Enfants de France, ainsi que de *Essai d'éducation nationale ou plan d'études pour la jeunesse* de La Chalotais, une œuvre très appréciée par Voltaire. Le projet de Gozzi insistait sur l'importance des connaissances historiques sur la formation civique et morale de la jeunesse, en particulier l'histoire de l'éducation dans l'Antiquité. Il recommandait une étude du latin expurgée des règles inutiles, celle de l'italien et un enseignement des Lettres débarrassé de poésies superflues. Enfin, Gozzi préconisait un enseignement de la Logique associé à la Géométrie et une histoire critique de la Philosophie. On sentait dans ce projet l'état d'esprit du critique littéraire qui avait réveillé le culte de Dante en Italie et une sensibilité tournée vers l'histoire des mœurs et des institutions. En fait, seules les suggestions de Gozzi sur la formation professionnelle à l'école élémentaire furent prises en considération. Les Ecoles de Sestiere devinrent des centres d'instruction primaire et de préparation aux métiers d'artisanat en 1774.

Dans le royaume de Naples, le règne de Charles VII de Bourbon (1734-1759) fut une période de réformes réduisant le poids politique et économique de l'Eglise et des féodalités, réorganisant l'administration et le système judiciaire. Cette politique se poursuivit pendant la Régence (1759-1767) avec le ministre Bernardo Tanucci qui supprima les privilèges des congrégations napolitaines et instaura le mariage civil; mais elle connut ses limites au niveau universitaire, la réforme introduite par l'abbé Celestino Galiani se contentant d'une amélioration de la condition magistrale. L'enseignement primaire et secondaire napolitain était exclusivement entre les mains de l'Eglise, avec les séminaires et les collèges de Jésuites. L'expulsion de ces derniers (1767) ouvrit la voie à une réorganisation du système scolaire. Le

plan de l'économiste Antonio Genovesi qui prévoyait une réforme organique de l'enseignement d'Etat ne fut pas adopté. Il dépassait le modèle traditionnel de la *Ratio studiorum* pour s'ouvrir sur une culture scientifique et technique, et sur la formation professionnelle. Il rénovait les méthodes didactiques et modernisait la formation des enseignants; mais le gouvernement napolitain préféra s'en tenir à une amélioration du système scolaire existant, n'adoptant que quelques mesures en matière didactique et au sujet des livres scolaires. La laïcisation de l'enseignement primaire et populaire ne connut qu'une faible diffusion, se heurtant à la résistance des ordres religieux. En 1785, Gaetano Filangieri publiait la *Scienza della legislazione* qui s'inspirait de *L'Esprit des lois* de Montesquieu, tout en utilisant les abstractions des Lumières et un certain humanisme pour déboucher sur une nouvelle forme de conscience. Attiré par le naturalisme de Rousseau, Filangieri s'en distinguait en insistant sur le but politique et social de l'éducation dont la finalité propre était d'assurer l'ancrage des vertus civiques. L'objectif de l'éducation était moins la formation de l'homme que celle du citoyen. Chez Filangieri, l'instruction publique était totalement à la charge de l'Etat dans la première classe d'enseignement primaire qui préparait au travail manuel et limitait la formation intellectuelle à l'acquisition des fondamentaux. L'enseignement d'Etat était par contre à la charge des élèves dans une deuxième classe qui développait les facultés cognitives essentielles: la perception, la mémoire, l'imagination et la raison. Les enfants recevaient un enseignement moral et l'instruction religieuse, retirée au clergé, était dispensé par un Magistrat de l'éducation. Filangieri était écartelé entre les aspirations universalistes d'une législation idéale et les exigences concrètes de son temps. La

situation politique du royaume de Naples se renversa totalement au lendemain de la conspiration de 1793 mettant fin au processus de rénovation des études.

Les réformes entreprises en Lombardie autrichienne obéirent à une impulsion donnée par Marie Thérèse et par le chancelier Kaunitz. La réorganisation administrative impériale conduisit en 1786 à la suppression des organismes juridiques représentatifs de l'aristocratie lombarde remplacés par des Départements sous l'autorité du ministre plénipotentiaire de la cour de Vienne. La responsabilité de l'Université de Pavie et des Ecoles palatines fut transférée à une Députation. Elle était présidée par Gian Rinaldo Carli qui était également à la tête du Conseil du Commerce et de l'Industrie ainsi que du Comité des Finances après la publication de son fameux traité *Sulle monete* (1751-1759). La Députation présenta les deux plans de réforme de 1771 et 1773. Ils prévoyaient deux Facultés distinctes en Médecine et Philosophie, à côté de celles de Théologie et de Droit, la création de 3 grades académiques (licence, magistère et doctorat), un examen à la fin de chaque cours, une bibliothèque et un jardin botanique. L'Université était placée sous l'autorité de l'Etat. En 1775, la *Relazione* de l'abbé Giovanni Bovara concernait l'ensemble du système éducatif lombard. Elle demandait la création d'une Ecole de formation des maîtres, l'élaboration des horaires et des programmes d'enseignement par une commission d'Etat, une école primaire gratuite sans latin et des écoles d'arithmétique supérieure et de dessin pour l'initiation aux métiers de l'industrie et du commerce. La *Relazione* s'inspirait de *L'Essai d'éducation nationale* de La Chalotais et du *Saggio sulla pubblica educazione* (1773) de Giuseppe Gorani, un auteur converti au parti des philosophes (*Il vero despotismo*); mais le *Nuovo me-*

todo per le scuole pubbliche de Gian Rinaldo Carli (1774) fut la principale source d'inspiration de l'abbé Bovara. Le *Plan pédagogique* qui suivit la *Relazione* prévoyait la création d'écoles d'éducation d'Etat dispensant les fondamentaux aux enfants âgés de 4 à 10 ans. Un enseignement secondaire public serait destiné aux enfants des classes aisées et aux plus doués issus des milieux populaires. On y enseignerait la langue italienne, la morale, l'histoire nationale, la géographie, la géométrie, la logique et la métaphysique. A 16 ans, les élèves entreraient à l'académie où ils recevraient une formation scientifique, littéraire, économique et juridique. Le bilan des réformes de Marie Thérèse et de Joseph II en Lombardie fut en réalité surtout politique, avec l'affirmation du rôle de l'Etat dans l'instruction primaire. La principale réalisation scolaire de cette période fut la création progressive d'écoles normales, le père somasque Francesco Soave étant chargé d'adapter à la Lombardie celles qui existaient en Autriche. Les réformes réalisées en Lombardie autrichienne marquèrent un tournant dans l'histoire scolaire de la péninsule. L'école d'Etat italienne va y puiser ses racines idéologiques et son organisation au XIX^e siècle.

L'expérience des républiques «jacobines» italiennes eut d'importantes répercussions politiques, économiques et sociales; mais le bilan de ces trois années républicaines (1796-1799) s'avéra plus fructueux en matière de projets d'enseignement qu'en réalisations concrètes. Dans son *Saggio d'istruzione pubblica rivoluzionaria*, Matteo Galdi soutenait la nécessité d'un enseignement d'Etat de 3 degrés: L'instruction primaire dispenserait les fondamentaux, un catéchisme moral et une éducation physique. Un cours post-primaire réservé aux élèves les plus doués comprenait des enseignements de

grammaire latine et italienne, d'histoire et de géographie, ainsi qu'un apprentissage aux métiers agricoles et artisanaux. Les programmes de l'Instruction élémentaire correspondaient à un enseignement secondaire. Ils portaient sur les langues et littératures classiques, la géométrie et l'analyse mathématique, la physique et les sciences naturelles, le droit, la logique et la métaphysique. L'instruction supérieure formait enfin les futurs enseignants et académiciens dans des Facultés universitaires de Lettres, de Philosophie, de Droit et de Médecine. Directeur général de l'Instruction publique, Matteo Galdi dut se contenter d'une diffusion d'ailleurs limitée de l'instruction publique dans le royaume de Naples. Une production littéraire multiforme s'efforça de former «l'homme nouveau», républicain, fervent patriote et bon citoyen afin de promouvoir «l'instruction publique révolutionnaire». Celle-ci affectionnait le «catéchisme républicain» qui se présentait sous forme de dialogues pour toucher les milieux ouvriers et paysans. Des *Cercles* inspirés des «sociétés populaires» de la Révolution française, des «fêtes républicaines» et un «théâtre patriotique» poursuivaient un but identique; mais loin de rapprocher le peuple de l'idéal démocratique et des institutions républicaines ces publications et ces manifestations ne firent qu'alimenter la méfiance à leur égard.

L'ouvrage préfacé par Roberto Sani illustre parfaitement les origines idéologiques et culturelles du mouvement réformateur dans l'Italie du XVIII^e siècle. Il montre ses liens avec la pensée des Lumières et avec les nouveaux courants philosophiques, scientifiques et littéraires ainsi que leurs implications dans les domaines de l'éducation et de l'instruction civique.

Michel Ostenc

Bible et littérature de jeunesse, sous la direction de Béatrice Ferrier, «Cahiers Robinson», vol. 44, 2018, 252 pp.

La bible est un texte fondateur de la religion judéo-chrétienne qui a longtemps figuré dans les programmes scolaires à côté de la mythologie gréco-romaine, relevant à la fois du domaine de la littérature et de l'enseignement religieux. Les «Cahiers Robinson» présentent dans leur numéro 44 les enjeux culturels et idéologiques de cette littérature lorsqu'elle s'adresse à de jeunes lecteurs dans une société laïque (Daniel Henky, *L'Empreinte de la Bible, réécritures contemporaines de mythes bibliques en littérature de jeunesse*, Berne, Peter Lang, 2014, p. 13).

Les sujets bibliques figurent en bonne place dans la littérature éducative des XVIII^e et XIX^e siècles, de manière implicite dans les *Contes moraux* de madame de Genlis et dans les *Contes merveilleux* de Grimm, ou de manière explicite dans *La Bible d'une grand-mère* de la comtesse de Ségur comme dans le recours à l'épisode d'Abel et Caïn. Madame de Genlis exploite les valeurs de l'Écriture dans une forme renouvelée afin que ses écrits préservent toute portée spirituelle et toute forme de sacralité. Elle met en scène des personnages d'exception dotés d'une incontestable piété et remplis de vertus cardinales. S'y ajoutent l'espérance et la charité, le désir de justice de l'homme étant une réminiscence de l'héritage divin. Madame de Genlis ne pense pas que la nature humaine soit originellement bonne et elle délivre des leçons reflétant les Écritures dont sont tirées les substances moralisatrices (*Contes moraux* de madame de Genlis, Paris, Hachette, 1861). Dans les *Contes pour les enfants et la maison*, les références au christianisme superposées au merveilleux païen diffèrent selon la destination des légendes. Les textes destinés aux filles sont

tournés vers la piété, alors que les lectures masculines sont plus ludiques. La mentalité bourgeoise et protestante conduit les frères Grimm à privilégier un idéal féminin des plus sévères (*Vies et Métamorphoses des contes de Grimm*, sous la direction de Dominique Peyrache-Leborgne, Rennes, Presses Universitaires de Rennes, 2017). La comtesse de Ségur propose une approche de la Bible faisant état des réactions des jeunes lecteurs face à leur éducatrice. Des tensions s'opèrent entre une lecture rationnelle représentée par la parole enfantine et une lecture imprégnée par la foi. La parole largement donnée aux enfants qui s'expriment avec leur naïveté, mais aussi avec leur esprit critique, explique le succès de la «divine comtesse» qui allie à ses talents de conteuse une véritable connaissance de l'enfant (Sophie de Ségur, *Évangile d'une grand-mère*, Paris, Hachette, 1933). Cette perspective didactique associée à une forme de laïcisation conciliée à la morale chrétienne correspond au traitement du meurtre d'Abel par Caïn dans les livres pour enfants du XIX^e siècle; mais les enjeux moraux interdisent une liberté suffisante à l'égard du sujet biblique pour le renouveler à la lumière de son potentiel psychologique, politique, philosophique ou poétique.

Pendant l'entre-deux-guerres les références bibliques infléchissent la lecture des albums de Benjamin Rabier vers une forme de gravité compatible avec l'humour de l'auteur qui permet de sacraliser la condition humaine à travers les représentations animalières et d'afficher une spiritualité chrétienne en faveur de la paix et du patriotisme. La portée métaphysique s'envisage chez Rabier au miroir de l'animal souffrant et rédempteur de l'homme. L'affleurement biblique confère à ces albums une réflexion d'autant plus profonde qu'elle coexiste avec de graves événements de l'humanité comme la Grande guerre

et la montée des totalitarismes de l'entre-deux-guerres (Benjamin Rabier, *Flambeau chien de guerre*, Paris, Tallandier, 1916). Les textes bibliques sont entrés dans le corpus scolaire à la faveur des textes anciens et semblent se recentrer sur les récits fondateurs aux côtés d'autres textes religieux ou mythiques. Les versions scolaires de la Bible figurent dans les classes de français autour de personnages et de mythes (Anne Raymonde de Beaudrap, *Enseigner les faits religieux en classe de français. Etat des lieux, paradoxes et perspectives*, Lyon, Institut National de la Recherche Pédagogique, 2010).

La littérature contemporaine pour les jeunes transpose le sujet biblique de Moïse ou de la Reine de Saba en divertissement avec des choix esthétiques qui engagent l'imaginaire et incitent à une réflexion d'ordre existentiel (Pierre Chavot, *Sur les traces de Moïse*, Paris, Gallimard Jeunesse, 2001; Aurelia Hetzel, *La Reine de Saba. Des traditions au mythe littéraire*, Paris, Classique Garnier, 2012). Des procédés littéraires et les illustrations contemporaines réorientent la réception de la Bible vers des préoccupations profondément humaines proches du lecteur (Philippe Lechermeier, Rebecca Dautremier, *Une bible*, Vanves, Gautier-Languereau, 2014). La Bible en Lego présente une originalité liée à l'utilisation d'un jouet contemporain qui n'est pas sans ambiguïté au niveau de la perception de l'utilisateur. Dans le film d'Aug Lee *Life of Pi*, les écarts d'interprétation par rapport au roman liés à la place accordée à l'univers biblique laissent au spectateur une certaine liberté, tout en insistant sur la place de l'animal dans la voie d'accès au divin (Anne Besson, *Incroyable fiction: l'histoire de Pi de Yann Martel*, in *L'Arche de Noé*, Arras, Artois Presses Universitaires, 2006, pp. 218-231).

Cette dimension synchrétique associée à des préoccupations philosophiques ou

écologiques correspond à l'évolution du traitement littéraire de certains mythes comme celui de Jonas. Au fil du temps, la Bible s'émancipe d'une forme de pensée religieuse. Cette évolution vers une culture laïque apparaît dans le théâtre francophone contemporain qui se réapproprie les motifs bibliques pour dénoncer les dysfonctionnements de la société et faire naître dans le jeune public l'espoir dans le passage de l'enfance au monde adulte. C'est dans l'imaginaire fantastique en vogue dans la culture contemporaine pour la jeunesse que les allusions bibliques sont les plus variées. Elles participent d'un fonds culturel propice au développement d'un monde surnaturel offrant un rapport au sacré: la «*Trilogie du vent*» de Madeleine L'Engle, les cycles *De Fallen* ou *Hush Hush*. La signification de l'œuvre repose sur le rapport au langage et relève d'une expérience spirituelle ou mystique déconnectée de sa portée judéo-chrétienne. Le traitement de la figure de l'ange déchu obéit également à une inversion des valeurs traditionnelles, assimilant rébellion et rédemption. L'amour est érigé en valeur transcendante au-delà de l'autorité divine (Elizabeth Chandler, *Le Baiser de l'ange*, Paris, Hachette 2010; Danielle Trussoni, *La Malédiction des Anges*, Paris, Fleuve Noir, 2010). A contrario de la figure de l'ange, celle du zombie relève du détournement d'un verset biblique dont elle offre une lecture aux antipodes de l'exégèse et de la vision chrétienne de la résurrection (Maxime Coulombe, *Petite philosophie du zombie*, Paris, P.U.F., 2012). Dans la même lignée, des séries américaines font la part belle à l'apocalypse et aux vampires pour témoigner de l'influence de motifs bibliques.

La littérature de jeunesse contemporaine c'est tout d'abord appuyée sur l'héritage du passé en adaptant au monde contemporain des valeurs attribuées à la

figure biblique; mais elle a aussi enrichi le mythe de valeurs nouvelles marquant sa spécificité. Cette évolution s'inscrit dans un mouvement de revalorisation de l'instruction religieuse et morale qui correspond aux difficultés d'entrer dans le monde adulte.

Michel Ostenc

Terciane Ângela Luchese, Alberto Barausse, *Celebrations of Italianes: italian immigration in Rio Grande do Sul and schools, between memory and history (1924-1926)*, «History of Education & Children's Literature», vol. XV, n. 2, 2020, pp. 671-698.

Roberto Sani, Mons. Giovanni Battista Scalabrini and italian emigration in Brazil: pastoral care, education and national identity (1888-1905), «History of Education & Children's Literature», vol. XV, n. 2, 2020, pp. 449-469.

Roberto Sani, «Per conservare la fede dei padri». *La Guida spirituale per l'emigrato italiano nella America del sacerdote scalabriniano Pietro Colbacchini*, Milano, FrancoAngeli, 2020, 99 pp.

Des mutations politiques radicales survinrent au Brésil avec l'abolition de l'esclavage (mai 1888) et la proclamation de la République (novembre 1889). L'émigration italienne avait commencé vers 1875, mais elle augmenta au début des années 1890, créant deux types d'installation coloniale. Les salariés des grandes plantations de café (Fazendas) étaient les plus nombreux dans les Etats de Sao Paulo, Minas Gerais, Espirito Santo ou Bahia; mais dans le Rio Grande do Sul, les autorités brésiliennes installèrent des colons italiens sur les pentes du plateau s'inclinant vers le Rio Uruguay. Ces groupes d'émigrants défrichèrent la forêt et installèrent de petites

fermes dont ils devinrent propriétaires. Installés sur les lots de terre trop petits, souvent isolés, très prolifiques, ces colons devinrent vite des pionniers qui se taillèrent de nouveaux domaines. L'épuisement des sols et la pression démographique entraînèrent la mobilité de ces agriculteurs qui pénétrèrent dans l'Etat de Santa Catarina au nord, et même dans celui du Parana. Leur «marche pionnière» était celle de petits exploitants. Dans leurs fermes, ces colons italiens développaient les cultures céréalières (blé, maïs, riz), les plantations de tabac et la viticulture. Ils purent exporter une partie de leur production agricole malgré leur isolement grâce à une navigation fluviale relativement active.

Le cinquantenaire de l'implantation des immigrés italiens dans le Rio Grande do Sul donna lieu à d'importantes commémorations (novembre 1924-décembre 1925) en présence des ambassadeurs d'Italie au Brésil, le général Pietro Badoglio et le baron Giulio Cesare Mantagna. Le consul italien à Porto Alegre Luigi Arduini y assistait ainsi que les plus importantes personnalités de la colonie italienne. Le comité du cinquantenaire était présidé par le physicien Giovanni Campelli, ses activités étant en partie financées par l'Etat du Rio Grande do Sul. Les villes italiennes d'où les immigrés étaient originaires envoyèrent des messages de solidarité (Venise, Vicence, Crémone) ainsi que le sénateur maire de Milan le chirurgien Mangiagalli. Mussolini lui-même salua le travail de ces pionniers italiens. Dans sa réponse, Giovanni Campelli le remercia en soulignant combien l'indifférence des précédents gouvernements italiens à l'égard des colons avait provoqué des vagues de dénationalisations parmi eux. Des monographies furent présentées qui retraçaient l'histoire des communautés de pionniers et un hymne du cinquantenaire rendit hommage au Brésil en le remerciant d'avoir apporté aux co-

lons la liberté et de meilleures conditions de vie. Ces diverses manifestations de 1925 ont laissé d'importantes sources documentaires qui montrent la persistance de l'identité italienne chez ces immigrés. La possession de terres était sans doute une opportunité offerte par le pays d'accueil; mais elle ne suffisait pas pour inciter les colons à oublier leurs origines.

Le consulat italien de Porto Alegre condamnait toute naturalisation et, au début des années 1890, le gouvernement italien les avait sanctionnées par l'arrêt de ses subsides. Au début du XX^e siècle, la Fédération *Italica Gens*, une organisation catholique nationaliste représentée au Brésil par Cesare Bompard, défendait l'identité nationale des colons et militait pour qu'ils puissent jouer un rôle plus important dans l'Etat du Rio Grande do Sul (G. Rosoli, *La Federazione Italica Gens e l'emigrazione italiana oltreoceano: 1909-1920*, «Il Veltro», nn. 1-2, 1900, pp. 87-100).

Les communautés italiennes d'agriculteurs du Rio Grande do Sul formaient de petites municipalités baptisées de noms qui évoquaient leur pays et son histoire (Nova Roma, Garibaldi) ou leur région d'origine (Nova Vicenza). Ils y multipliaient les sociétés mutuelles, les squares, les plaques commémoratives et les chapelles, autant d'espaces ou de témoignages qui entretenaient l'identité nationale italienne. Une organisation très structurée multipliait les comités et les sous-comités sur un mode pyramidal. La religion catholique était un facteur primordial de la préservation de l'identité des immigrés. En 1890, le Brésil comptait 17 diocèses seulement pour une superficie de 3 millions de km². Plusieurs congrégations religieuses dépêchaient leurs missionnaires sur le continent américain. Parmi elles figuraient des Frères mineurs capucins, des Lazaristes, des Jésuites, des Franciscains et des communautés de Bénédictines. Les travailleurs

italiens des «fazendas» recevaient des visites périodiques de missionnaires; mais leur détresse physique et morale les incitait à abandonner la langue italienne et toute pratique religieuse. La situation des immigrés établis en ville était très différente; mais l'éloignement de leur communauté d'origine, l'esprit individualiste, le consumérisme et la propagande anticléricale stérilisaient toute tentative pour les maintenir dans la pratique religieuse. Par contre, les colonies agricoles formées par des familles venues en majorité d'une même région (Vénétie, Trentin, Lombardie) étaient animées d'un sentiment religieux vigoureux et d'un solide esprit identitaire. Dans ces communautés du Rio Grande do Sul l'action missionnaire perpétua non seulement les formes traditionnelles d'expérience religieuse mais aussi un nouveau modèle de prêtrise. Les missionnaires se heurtèrent à des difficultés liées à deux organisations différentes de l'Eglise et à deux conceptions opposées de la pratique pastorale. L'idéal des missionnaires reposait sur la pratique liturgique, l'administration des sacrements et la catéchèse; mais le mode de vie ecclésiastique en Amérique latine transformait le prêtre en fonctionnaire de l'Etat. La religiosité populaire se développait à travers des prières sommaires et une catéchèse élémentaire. Or, la colonisation italiennes des terres du Rio Grande do Sul présentait un profil moral susceptible d'être exploité par les missionnaires à condition d'adapter la pratique pastorale et religieuse à leur mode de vie communautaire. Le père Colbacchini, un missionnaire de la Compagnie des «Scalabrini» proche des règles de Charles Borromée, avait su gagner la confiance des colons italiens en s'installant à Curitiba en 1886 et l'évêque de Porto Alegre lui avait confié la juridiction paroissiale sur tous les immigrés italiens de la zone de Alfredo Chaves. Son *Guida spirituale per l'emigrato italiano nella America*

faisait partie des textes religieux destinés à la catéchèse qui se multiplièrent en Italie au XIX^e siècle; mais il sut associer l'œuvre pastorale à l'espérance d'une vie meilleure pour des immigrés après le douloureux abandon de la mère patrie. Loin d'exalter des vertus héroïques et des pratiques religieuses strictes, il insistait sur l'importance d'une vie simple et frugale pour conserver une foi chrétienne et réaliser son salut spirituel. Conscient de la fragilité humaine, il préconisait dans la tradition d'Alfonso di Liguori une union avec Dieu par la prière. Chaque famille devait créer son oratoire pour aider à la pratique des dévotions quotidiennes et l'exercice du chemin de croix permettait d'accroître la ferveur religieuse. Le centre moteur de cette pastorale se situait dans la pratique liturgique, dans l'administration des sacrements et dans la catéchèse paroissiale. Les colons devaient maintenir un juste équilibre entre le maintien des traditions et la nécessité de ne pas se couper des coutumes civiles et religieuses du pays d'accueil. Les missionnaires préservèrent l'identité italienne en ouvrant des écoles dans les communes où n'existaient pas d'établissements d'Etat. (G. Rosoli, *Alfabetizzazione e iniziative educative per gli emigrati tra Otto e Novecento*, in L. Pazzaglia, *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 119-144). Ces écoles célébraient les événements importants de l'histoire nationale italienne, en insistant sur les faits les plus récents comme la déclaration de guerre de mai 1915, l'armistice du 4 novembre 1918, la «marche sur Rome» et le «Noël de Rome» (21 avril). Le rôle de l'école dans le maintien d'une tradition et d'une identité nationale a été essentiel; mais cela a demandé des négociations parfois difficiles avec le pouvoir brésilien. La fusion des communautés immigrées allemandes au Brésil sera retardée par leur isolement,

les *Teuto brésiliens* utilisant pendant longtemps leur langue d'origine. Ce n'est qu'après la Deuxième guerre mondiale que les autorités brésiliennes s'attaquèrent au problème de leur intégration.

Les missionnaires catholiques ont été parfois accusés par les historiens brésiliens de cultiver des préjugés ethniques responsables du manque de collaboration avec le catholicisme local et d'une incompréhension de la réalité politique, culturelle et religieuse locale; mais ils incitèrent au contraire les colons italiens à acquérir leur nouvelle nationalité, à respecter la loi et les autorités de leur pays d'adoption. Leur assimilation sera facilitée par une communauté d'immigration d'origine méditerranéenne et par la religion catholique.

Michel Ostenc

Maria Bocci, *L'«anima cristiana della contestazione». Gli studenti dell'Università Cattolica del Sacro Cuore*, Roma, Edizioni Studium, 2020, 296 pp.

Nella rinnovata stagione storiografica dell'ultimo ventennio dedicata ai movimenti studenteschi del Sessantotto e all'interno del quanto mai attuale dibattito sviluppatosi sul nuovo modo di studiare e riconsiderare il valore e il ruolo della contestazione giovanile di fine anni Sessanta, merita una particolare menzione il recente ed interessante volume di Maria Bocci, *L'«anima cristiana della contestazione». Gli studenti dell'Università Cattolica del Sacro Cuore*. Ben lontano da quei lavori di taglio esclusivamente memorialistico o dalle ricerche di impostazione sociologica che hanno a lungo condizionato e penalizzato la storiografia di settore, il libro pubblicato nella prestigiosa e longeva collana «Cultura» delle Edizioni Studium ha il pregio di ricostruire, grazie ad un notevole apparato

di documenti editi ed inediti indagato con solida metodologia, la storia di una delle avanguardie più notevoli del Sessantotto italiano, ossia gli studenti dell'Università Cattolica. Il volume, con dovizia di particolari, ne segue le prospettive ideologiche e le dinamiche di sviluppo tra gli anni Cinquanta e Sessanta, offrendo al lettore una ricostruzione precisa ed esaustiva degli avvenimenti e soprattutto proponendo chiavi interpretative quanto mai utili per comprendere per quale motivo e secondo quali modalità i ragazzi dell'Ateneo del Sacro Cuore siano stati, di fatto, coloro che hanno anticipato i tempi rispetto ad altre realtà studentesche e fornito i reparti avanzati della lotta studentesca.

Se per un lungo periodo di tempo, la storiografia sul Sessantotto, inaugurata dal primo saggio di Franco Catalano, ha insistito soprattutto nell'individuare nel mancato riformismo del centro-sinistra e nella inadeguatezza della sua politica scolastica le ragioni prioritarie e talvolta anche esclusive della contestazione, merito del lavoro di Maria Bocci è stato proprio quello di aver spostato il *focus* della ricerca anche su altri piani, come ad esempio, l'analisi della storia della gioventù, cattolica *in primis*, e dei suoi orizzonti comuni di attesa, grazie alla quale è possibile comprendere appieno i motivi più reconditi della "ribellione" studentesca. Quanto mai utile ed opportuno, per una ricerca che non arrivi a risultati superficiali e troppo ideologizzati, risulta dunque indagare l'intero e tortuoso itinerario che ha portato i giovani italiani, ma anche europei più in generale, verso il Sessantotto, un'analisi che in alcun modo può prescindere dal considerare i cambiamenti dell'universo giovanile tra anni Cinquanta e Sessanta e gli orientamenti del mondo studentesco nei decenni che precedono la contestazione. Secondo la Bocci è la chiave di lungo periodo a dover guidare l'interpretazione di una fase così delicata della

storia contemporanea, «perché solo a partire da una prospettiva che, pur considerando la discontinuità del Sessantotto, lo inserisce all'interno di un processo dilatato nel tempo, se ne possono capire la genesi, le peculiarità, la pervasività, gli effetti» (p. 12).

L'«*anima cristiana della contestazione*» si impegna dunque a restituire il Sessantotto alla storia del Novecento mettendo ben in luce come la contestazione giovanile riproduca a suo modo le angosce innescate dal processo di modernizzazione che ha caratterizzato la storia europea lungo tutto il secolo. La novità degli anni Sessanta è che la ribellione contro la civiltà della produzione e del consumo si innesca, per la prima volta, «dentro quella stessa società consumistica che viene rifiutata in nome della lotta contro l'alienazione di massa» (p. 14).

Tutti questi temi sono quanto mai presenti anche nelle menti e negli animi dei giovani militanti nel cattolicesimo organizzato e pertanto scrivere la storia del Sessantotto, come ben si evince dal lavoro della Bocci, non può prescindere dall'analizzare anche il versante cattolico della contestazione giovanile, nella ferma e condivisibile convinzione, talvolta troppo ignorata dalla storiografia di partito degli anni Settanta e Ottanta, che non diversamente dagli appartenenti ad aree politico-culturali poi approdate al Sessantotto, anche i ragazzi del mondo cattolico hanno dovuto percorrere un lungo e accidentato cammino che va opportunamente indagato, con specifico riferimento soprattutto agli studenti universitari, «soggetto sociale di gran lunga più attivo e culturalmente agguerrito» (p. 15). Nel volume, dunque, si riesce con successo a ricostruire il percorso della gioventù universitaria cattolica verso il Sessantotto ed in particolare il caso di una delle avanguardie più importanti della contestazione sessantottina italiana,

quella dell'Università Cattolica del Sacro Cuore che viene studiata con l'ausilio degli strumenti propri dello storico e accantonando ogni forma di rievocazione che risentirebbe inevitabilmente ed eccessivamente della biografia di chi racconta. Del resto gli anni Sessanta rappresentano una fase delicata e cruciale della storia dell'ateneo dei cattolici italiani, tra la fine del lungo rettorato di Agostino Gemelli, fondatore e rettore "a vita", e la graduale ma progressiva trasformazione dell'ateneo sia nelle sue strutture di governo che nella sua estensione territoriale, oltre che dal punto di vista, assolutamente non trascurabile, degli immatricolati.

Dalla lettura dell'opera di Maria Bocci, costituita da una ricca *Introduzione* dell'autrice e da tre ampi capitoli (*Giovani cattolici verso il Sessantotto*, *Gli studenti dell'Università Cattolica nei lunghi anni Sessanta* e *La contestazione dell'Università Cattolica del Sacro Cuore*), emerge inoltre un costante *leit motiv* da ritenere ormai imprescindibile per chiunque voglia avviare o dedicarsi alle ricerche sul Sessantotto. A differenza di quanto si affermava in altri tempi, infatti, è ormai innegabile il notevole contributo offerto dalla gioventù cattolica, in Italia e in Europa, alla mobilitazione giovanile degli anni Sessanta. Grazie alla sua puntuale ricostruzione la Bocci riesce a sostenere e documentare la tesi secondo la quale il mondo cattolico, dunque, non abbia subito il Sessantotto e i suoi effetti destabilizzanti, bensì abbia offerto alla contestazione giovanile una vera e propria «anima cristiana», formata da ragazzi e ragazze che sono transitati dall'impegno militante nelle organizzazioni cattoliche europee alle barricate di fine decennio. Per tale motivo, è giusto sottolineare come il viaggio della gioventù cattolica non si sia sviluppato su binari separati rispetto alla più estesa mobilitazione giovanile ma ne abbia condiviso aspettative e sollecitazioni

ni maturate a partire dalla seconda metà degli anni Cinquanta, che richiedono di essere studiate e approfondite con rigore e serietà interpretativa per comprendere appieno il vero valore del Sessantotto.

Dopo essere usciti dalla fase della memoria ed aver superato il periodo delle ricostruzioni giornalistiche, inevitabile a causa della vicinanza degli eventi narrati, il lavoro della Bocci e di altri brillanti studiosi collocabili all'interno di una nuova ed "illuminata" epoca della storiografia sul Sessantotto (si pensi, solo per citarne alcuni, ai lavori di Francesco Bonini, Alessandro Breccia, Marta Busani, Mirco Dondi, Marta Margotti, Giovanni Orsina, Gaetano Quagliariello, Andrea Romano e Simona Salustri), permettono di studiare le fonti documentarie del periodo, ingenti e numerosissime, con un approccio metodologico nuovo capace di proporre prospettive comparatistiche nella lettura e nell'interpretazione dei documenti e di offrire finalmente al lettore una storia seria e rigorosa della contestazione studentesca del Sessantotto che non rappresenti soltanto l'occasione per mettere sotto i riflettori qualche protagonista di un periodo tanto complesso e policromatico come quello sessantottino.

Luigiaurelio Pomante

Antonio Lerra, *L'Università degli Studi della Basilicata. Per un profilo storico*, Potenza, BUP-Basilicata University Press, 2020, 220 pp.

Nel corso dell'ultimo trentennio le ricerche sulla storia delle università e dell'istruzione superiore in Italia in età contemporanea hanno conosciuto una significativa e rinnovata stagione di studi grazie soprattutto alle attività promosse dal Centro Interuniversitario per la Storia delle Università Ita-

liane e allo sviluppo di numerosi centri di ricerca locali dislocati in numerosi atenei della Penisola. In questo quadro di crescente interesse storiografico per le vicende novecentesche delle diverse università italiane può a buon diritto essere inserito il recente e accurato lavoro di Antonio Lerra, *L'Università degli Studi della Basilicata. Per un profilo storico*. Attraverso una ricca e selezionata messe di documenti d'archivio e di fonti a stampa, l'autore ricostruisce con dovizia di particolari la storia del piccolo e giovane ateneo lucano che ha visto la luce soltanto all'inizio degli anni Ottanta ma che in pochi anni ha fatto registrare una significativa e qualificata crescita sia dal punto di vista quantitativo che qualitativo. Attraverso cinque dettagliati capitoli e una preziosa appendice documentaria e fotografica, l'autore ricostruisce e rilegge il percorso di vita dell'Ateneo, dall'alveo della sua istituzione alla configurazione delle sue attuali attività, in modo tale «da poter immettere più direttamente i lettori, anche se non addetti, nei progressivi contesti di riferimento», al fine di far cogliere a tutti, insieme con il progressivo percorso di ruoli e funzioni propri dell'Ateneo, anche portata ed incidenza della sua presenza e del suo operare, a livello di interrelazioni istituzionali e sul territorio, oltre che di sue rappresentazioni e percezioni. Grazie alla corretta e non apologetica interpretazione dei documenti ufficiali e degli articoli apparsi su periodici locali e nazionali, nonché attraverso lo spoglio accurato delle relazioni dei rettori in occasione delle solenni inaugurazioni degli anni accademici, fonte questa quanto mai preziosa per una ricostruzione attenta della storia di ogni singolo ateneo, antico o più giovane che sia, Lerra riesce a far brillare le connotazioni distintive di un Ateneo, che, pur tra non pochi pre condizionamenti, soprattutto strutturali e di servizi, in particolare nei primi anni, è finora riuscito, anche in

presenza di progressive restrizioni finanziarie statali, non solo a salvaguardare e a tenere alti i livelli della sua attività scientifica e dell'offerta didattica, ma a svolgere un sempre più attivo e diffuso ruolo di presenza e di iniziativa sul territorio. E ciò essenzialmente quale risultante di virtuosi rapporti interistituzionali costruiti e sviluppatisi negli anni, in particolare con la Regione Basilicata, nell'autonomo esercizio di reciproci ruoli e funzioni. Istituita ufficialmente con la legge n. 219 del 14 maggio 1981, l'Università degli Studi della Basilicata affonda tuttavia le proprie radici nel portato legislativo del tragico terremoto del 23 novembre 1980 che rappresentò di fatto la concreta opportunità per la creazione di un'università statale, al culmine di un dibattito quasi decennale circa la necessità di favorire in quella precisa zona territoriale del meridione uno sviluppo deciso del sistema scolastico e universitario. La nascita dell'ateneo lucano, come del resto quello del Molise, avvenne dunque, per la prima volta nel nostro Paese, non attraverso una legge specifica, ma all'interno del più complessivo provvedimento legislativo riguardante la ricostruzione e lo sviluppo delle aree colpite dal sisma, e se da un lato ciò concorse ad accelerarne i tempi istitutivi, dall'altro ne rese più concretamente e direttamente rappresentabile e percepibile la sua connotazione identitaria quale volano primario di rinascita e di sviluppo regionale, come, del resto, fu da subito ampiamente ed unitariamente evidenziato nel corso delle tante iniziative politico-istituzionali che fecero seguito al provvedimento legislativo. A contribuire in maniera determinante alla nascita e allo sviluppo dell'ateneo, secondo una prassi peraltro già diffusasi negli anni Settanta in altri atenei giovani della Penisola, la costituzione, nella primaria e principale sede di Potenza, di un Comitato Tecnico Amministrativo istituito, all'incirca un anno

dopo la legge 219/81, sotto la presidenza del prof. Emanuele Guggino, ordinario di Idrologia tecnica all'Università di Catania e composto dai proff. D. Matassino e F. Albano Leoni, rispettivamente ordinario di Zootecnica generale e straordinario di Filologia germanica all'Università di Napoli, nonché dal prof. Romualdo Coviello e dal dott. Michele Cascino, rappresentanti della Regione Basilicata e dal dott. Innocenzo Santoro, rappresentante del Ministero della Pubblica Istruzione. Quindi, di lì a poco, la nascita dei quattro comitati ordinatori delle quattro facoltà e l'insediamento del primo senato accademico, presieduto dal prof. Cosimo Damiano Fonseca, primo rettore dell'Università degli Studi della Basilicata e tra i principali artefici della rapida e fruttuosa crescita dell'ateneo (Fonseca è stato rettore fino all'anno accademico 1993-1994). Il 30 agosto 1983, lo Statuto del nuovo Ateneo lucano fu approvato con decreto del Presidente della Repubblica: del comitato tecnico-scientifico che lo redassero facevano parte Sabino Casse, Giovanni Marongiu, Giunio Luzzato e Sergio Zoppi. Di qui l'istituzione della Facoltà di Scienze Matematiche, Fisiche e Naturali con i corsi di laurea in Matematica e in Chimica; di Ingegneria con i corsi di laurea in Ingegneria civile, sezione edile, Ingegneria civile per la difesa del suolo e la pianificazione territoriale, Ingegneria idraulica; di Lettere e Filosofia con il corso di laurea in Lingue e Letterature straniere moderne; di Agraria con i corsi di laurea in Scienze delle preparazioni alimentari, Scienze forestali, Scienze agrarie. Il 23 novembre 1983 fu il presidente della Repubblica, Sandro Pertini, a inaugurare l'anno accademico 1983-1984, avviando di fatto le attività dei nove corsi di laurea. Nel corso di quella prima cerimonia inaugurale, il rettore Fonseca specificò anche i dati sulle prime immatricolazioni, con una domanda che si rivelò sin da subito «molto più

ampia rispetto alle previsioni: 892 iscritti in totale fino al 5 novembre di quell'anno, di cui il 63% maschi e il 37% donne». Nel primo anno accademico di vita dell'ateneo gli iscritti saranno poi complessivamente 904. La popolazione studentesca, dopo un primo biennio statico, nell'anno accademico 1986-1987 sarà di 1.530 persone (831 maschi e 698 donne), di 2.237 nel 1989 e di 4.167 nel 1994, per raggiungere la cifra di cinquemila iscritti (secondo le previsioni del progetto iniziale) nell'anno accademico 1999-2000, e arrivare a 7.500 nel 2002-2003. Nei suoi quarant'anni di vita, sottolinea a più riprese Lerra nel suo volume, gli sforzi congiunti degli organi accademici, della regione Basilicata e periodicamente anche del ministero della Pubblica Istruzione hanno altresì mirato a consolidare l'offerta formativa dell'ateneo lucano (peraltro arricchitosi nel 1992 anche del nuovo polo universitario di Matera) al punto da trasformarlo in una piccola ma dinamica comunità accademica, legata sì al contesto locale, profondamente radicata e rispettosa delle tradizioni nazionali ma soprattutto assai attiva nel contesto internazionale della ricerca e della progettazione europea, grazie principalmente agli sforzi in tal senso dei rettori Mauro Fiorentino, Aurelia Sole, fino al più recente Ignazio Marcello Mancini.

Luigiaurelio Pomante

Franca Arduini, Vania Di Stefano (edd.), Maria Pascucci, *Lettere a Titomanlio Manzella e suoi familiari (1923-1974)*, Rimini, Raffaelli Editore, 2020, 138 pp.

Il volume curato da Franca Arduini e Vania Di Stefano è una puntuale e attenta raccolta delle lettere che Maria Pascucci, scrittrice per ragazzi e appassionata maestra originaria di Gambettola, scrisse a Ti-

tomanlio Manzella, scrittore, giornalista e insegnante catanese, e ai suoi familiari, tra il 1923 e il 1974.

Il carteggio ripercorre la storia di una sincera amicizia durata oltre quarant'anni, nata per il comune interesse letterario e mai scalfita, nemmeno in seguito ai rifiuti della Pascucci di fronte alle proposte di matrimonio di Manzella, che aveva perso l'amatissima moglie nel luglio del 1932.

Maria Pascucci diventa maestra nel 1913 «da prima senza passione, anzi con molto sacrificio», rinunciando – come tante altre donne in quel periodo – al desiderio di proseguire gli studi per non gravare sulla famiglia, ma, come lei stessa scrive, si abitua a quella professione e viene descritta come «sempre attenta nella ricerca costante del metodo migliore per seguire e guidare nei primi passi la crescita intellettuale dei piccoli alunni». Dalle sue lettere si coglie chiaramente che ad animarla e a riempirla di gioia sia, in particolare, l'attività letteraria, anche se spesso contrassegnata da momenti di scoraggiamento e di delusione nei confronti degli editori.

Allo scoppio della Prima Guerra Mondiale si trasferisce a Gatteo per insegnare e inizia a scrivere articoli e novelle; in seguito, si dedica anche a romanzi per ragazzi e avvia numerose collaborazioni con riviste culturali e didattico-pedagogiche, tra le quali si ricorda «I diritti della scuola».

È il 15 settembre del 1923 quando scrive quella che probabilmente è la prima lettera a Manzella, noto per essere stato uno scrittore dall'ingegno versatile e vivace, collaboratore di giornali per ragazzi, tra i quali si ricordano «Il Giornalino della Domenica» e il «Corriere dei Piccoli» e direttore di alcune riviste, seppur per brevi periodi, come «Rivista delle signorine» e «Farfalle. Rivista mensile illustrata per ragazzi e giovinette». La maestra romagnola ringrazia Manzella per l'invio del volume *Quasi un profilo* dello scrittore per l'infan-

zia Giuseppe Ernesto Nuccio e manifesta la volontà di inviargli dei racconti «se mi riuscirà di scriverne di discreti e adatti». Inizia così il lungo e ricco carteggio tra i due scrittori e, nonostante l'assenza delle lettere di Manzella, dalle parole della Pascucci si percepisce chiaramente un rapporto di profonda fiducia e stima reciproca che, nel tempo, assume un tono sempre più confidenziale e spinge la maestra a confidarsi e a raccontare la propria vita, sin da quell'infanzia che l'ha vista «una bambina un po' diversa dalle altre [...] vivace e nello stesso tempo chiusa, scontro-sa, timidissima».

L'amicizia tra i due inizia in un periodo che segna l'avvio di un'attività frenetica per Manzella, il quale alterna testi sulla simbolizzazione degli elementi vitali della natura come *Ridi, o sole!... Favole per Ragazzi intelligenti* a testi che descrivono le fatiche per la sopravvivenza quotidiana delle classi popolari (*Tanu e Michele Baccalà. Una storia di tutti i giorni narrata ai giovanetti*) e opere dedicate al folklore e alle condizioni dell'infanzia della sua terra, la Sicilia, come *Testallegra. Dieci storielle popolari siciliani*. La Pascucci accoglie con entusiasmo le opere dell'amico catanese, le definisce «belle e geniali» e, a sua volta, invia i suoi lavori, tra i quali si ricordano i racconti brevi per i più piccini pubblicati nella collana «Le Primule dorate» e il primo racconto lungo *Sulla Linea Gotica*, ispirato alle esperienze vissute durante il passaggio del fronte a Verucchio e a Rimini.

Manzella scrive – si legge in una lettera che la Pascucci invia alla figlia dello scrittore – 170 fra lettere e cartoline e, seppur si tratti di una corrispondenza mai reperita, sono sufficienti le parole della maestra romagnola per comprendere quanto i due scrittori si siano sostenuti e spronati a vicenda, condividendo la delusione nei confronti di quegli editori che «ci amareggiano

l'esistenza e fanno di tutto per allontanarci dalla nostra nobile fatica», e quanto lui sia stato un importante sostenitore dell'attività della Pascucci inviando «buone parole» per incitare l'amica a scrivere.

Le numerose lettere rappresentano un'importante risorsa per indagare la vita professionale e letteraria della maestra Pascucci, che può essere ricostruita anche attraverso i numerosi riferimenti ai concorsi letterari a cui partecipò e ai temi a lei più cari trattati spesso nei suoi scritti, come l'educazione pedagogica, la questione femminile e la denuncia nei confronti della «stampa corruttrice dei fanciulli». La Pascucci riceve significativi riconoscimenti nel corso della sua vita, che condivide sempre con l'amico catanese: si ricorda, ad esempio, il romanzo per ragazzi *Sulla Vetta* che viene segnalato nel 1957 al VII premio «Castello» e poi sceneggiato in quattro puntate per la RAI, mentre la raccolta di novelle *Donne* del 1958 ottiene il secondo premio al concorso dell'Ente Nazionale per le Biblioteche Popolari e il suo *La Santa Maria* del 1961 diventa un testo per le scuole.

Attraverso questo volume, i curatori hanno quindi inteso mantenere viva la memoria di una maestra e scrittrice per ragazzi contribuendo ad arricchire quegli studi di notevole interesse nell'ambito storico-educativo che consentono di ricostruire l'evoluzione della figura e del ruolo dell'insegnante nella storia culturale, sociale e scolastica del nostro Paese. L'attenzione e la cura di amici e familiari della Pascucci hanno permesso di preservare un ricco materiale – diari, taccuini, carteggi, pubblicazioni e riviste –, oggi conservato nel «Fondo Maria Pascucci» presso la biblioteca comunale «Antonio Baldini» di Santarcangelo di Romagna. Il forte interesse nei confronti della sua figura e della sua attività letteraria e il desiderio che tutto ciò non finisse nell'oblio sono dimostrati

anche dall'intitolazione, nel 1996, della scuola elementare di Santarcangelo alla maestra.

Questo lavoro dimostra, infine, quanto sia importante la conservazione degli archivi personali degli insegnanti e la valorizzazione dei fondi archivistico-documentari legati a donne e uomini che hanno segnato la storia del territorio. Lo studio di tale patrimonio è in grado di restituire le complesse dinamiche alla base della formazione intellettuale di maestre e maestri e delle loro competenze professionali attraverso la possibilità di giungere a una ricostruzione fedele delle loro esperienze offerta dai loro scritti, lettere e appunti personali.

Lucia Paciaroni

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Memoria scolastica ed educativa: questioni metodologiche, buone pratiche ed esperienze digitali. A proposito del terzo seminario nazionale PRIN (Firenze, 17 settembre 2020)

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School and educational memory: methodological issues, good practices and digital experiences. About the third national PRIN seminar (Florence, 17th September 2020)

ABSTRACT: This paper collects the reports presented at the third seminar about the important national research project «School Memories between Social Perception and Collective Representation (Italy, 1861-2001)» from scholars from different Italian universities. The seminar has represented the opportunity to reflect on the topic of school and educational memory focusing on future research perspectives in the historical-educational field and to share the state of the art of the project that aims at analyzing the forms of school memories, intended as an individual, collective and public practice recalling a common school past.

EET/TEE KEYWORDS: History of education; School Memories; Italy; National Research Project; XIXth-XXIst Centuries.

Il 17 settembre 2020, in videoconferenza, si è svolto il terzo seminario nazionale PRIN «Le forme della memoria scolastica e educativa. Questioni metodologiche, buone pratiche, esperienze digitali», organizzato dal Dipartimento di Formazione, Lingue, Intercultura, Letterature e Psicologia dell'Università degli Studi di Firenze in collaborazione con l'Università degli Studi di Macerata, l'Università degli Studi di Roma Tre e l'Università Cattolica del Sacro Cuore, nell'ambito dell'attività del Progetto di Rilevante

Interesse Nazionale «School Memories between Social Perception and Collective Representation (Italy, 1861-2001)»¹.

Il seminario ha rappresentato un importante momento di riflessione e confronto sul tema delle fonti in ambito storico-educativo, ponendo particolare attenzione, come sottolineato da Gianfranco Bandini, che ha aperto e moderato la prima sessione, sulle questioni metodologiche, «su cui è necessario riflettere anche alla luce delle nuove sfide a cui oggi sono chiamati gli storici, a partire dall'avvento del digitale».

La prima sessione è stata dedicata al tema *Memoria e storia dell'educazione: la questione delle fonti* nella quale si sono susseguiti gli interventi di studiosi provenienti da diversi settori disciplinari², mentre la seconda, riservata ai membri del PRIN, è stata incentrata sulla presentazione dello stato dell'arte del progetto.

Il primo intervento è stato di Bruno Bonomo sul tema *Le fonti orali nella storia contemporanea: peculiarità, statuto, buone pratiche*. Bonomo ha proposto una serie di stimolanti riflessioni sulle fonti orali, focalizzando l'attenzione sulle loro caratteristiche, sul loro impiego nell'ambito della ricerca storica e sulle questioni deontologiche.

Per lungo tempo – come sottolineato da Bonomo – le fonti scritte sono state considerate come base documentaria su cui era possibile fondare una ricostruzione del passato solida e attendibile, ma il novero delle fonti si è andato successivamente allargando e si è assistito a una riscoperta delle fonti orali, che ha contribuito a dare un apporto rilevante al rinnovamento della storiografia.

A tal fine sono state fondamentali le riflessioni maturate sulla natura delle fonti orali, sugli aspetti metodologici della loro raccolta, del loro utilizzo e, soprattutto, sulle potenzialità di queste fonti per lo studio della soggettività e della memoria, «una memoria non solo fonte ma anche oggetto della ricerca»³. Negli

¹ Il progetto «School Memories between Social Perception and Collective Representation (Italy, 1861-2001)», di durata triennale, è stato approvato con decreto del Direttore Generale per il coordinamento, la promozione e la valorizzazione della ricerca del Ministero dell'Istruzione, dell'Università e della Ricerca (n. 226 del 12 aprile 2019) e finanziato dal medesimo MIUR. Sono coinvolte come unità di ricerca principali le Università degli Studi di Macerata, Roma Tre, Cattolica del Sacro Cuore di Milano e Firenze. Per un approfondimento sul progetto si vedano: S. Montecchiani, L. Paciaroni, *Le forme della memoria scolastica. A proposito del primo seminario nazionale PRIN*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 1047-1053; S. Montecchiani, L. Paciaroni, *Le forme della memoria scolastica: interventi nazionali e prospettive internazionali. A proposito del secondo seminario PRIN*, «History of Education & Children's Literature», vol. XV, n. 1, 2020, pp. 809-816.

² Sono intervenuti Bruno Bonomo, professore di Storia contemporanea presso l'Università «Sapienza» di Roma e membro del direttivo dell'Associazione Italiana di Storia Orale, Monica Galfré, docente di Storia contemporanea presso l'Università degli Studi di Firenze, e Tiziana Serena, storica dell'arte specializzata nella storia culturale della fotografia e docente di Storia della fotografia e Storia dell'arte contemporanea presso l'Università degli Studi di Firenze.

³ Sul tema delle fonti orali si ricordano: L. Passerini (ed.), *Storia orale. Vita quotidiana e cultura materiale delle classi subalterne*, Torino, Rosenberg & Sellier, 1978; Ead., *Storia e*

ultimi trent'anni, come evidenziato da Bonomo, si è assistito a una stagione di forte integrazione delle fonti orali nel campo della storiografia accademica⁴ e a un riconoscimento ormai maturo di tali risorse nello strumentario metodologico della storia contemporanea⁵.

Infine, Bonomo ha evidenziato anche l'importanza degli aspetti etico-deontologici presentando «Buone pratiche per la storia orale»⁶, un documento realizzato dall'Associazione Italiana di Storia Orale – in collaborazione con storici e giuristi – nel quale sono indicate alcune raccomandazioni, anche alla luce delle recenti novità legislative, come l'introduzione del Regolamento Generale per la protezione dei dati personali⁷.

soggettività. Le fonti orali, la memoria, Scandicci, La Nuova Italia, 1988; G. Contini, A. Martini, *Verba manent. L'uso delle fonti orali per la storia contemporanea*, Roma, NIS, 1993; A. Portelli, *Storie orali. Racconto, immaginazione, dialogo*, Roma, Donzelli Editore, 2007; C. Bermani, A. De Palma (edd.), *Fonti orali. Istruzioni per l'uso*, Venezia, Società di mutuo soccorso Ernesto De Martino, 2008; B. Bonomo, *Voci della memoria. L'uso delle fonti orali nella ricerca storica*, Roma, Carocci, 2013.

⁴ Si pensi, ad esempio, alle ricerche e agli studi di Alberto Barausse, Gianfranco Bandini e Stefano Oliviero, ma anche di Fabio Targhetta, Mirella D'Ascenzo, Annemarie Augschöll Blasbichler e, recentemente, di Lucia Paciaroni. Per un maggiore approfondimento si vedano: A. Barausse, «E non c'era mica la bic!», *Le fonti orali nel settore della ricerca storico scolastica*, in H.A. Cavallera (ed.), *La ricerca storico-educativa oggi*, Lecce, PensaMultimedia, 2013, Vol. 2, pp. 539-560; G. Bandini, *Educational Memories and Public History: A Necessary Meeting*, in C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017, pp. 143-155; G. Bandini, A. Mangiatordi, *600 maestri raccontano la loro vita professionale in video: un progetto di (fully searchable) open data*, in C. Marras, M. Passarotti, G. Franzini, E. Litta (edd.), *Atti del IX Convegno Annuale AIUCD. La svolta inevitabile: sfide e prospettive per l'Informatica Umanistica*, Milano, Università Cattolica del Sacro Cuore, 2020, pp. 14-18; F. Targhetta, *Methodological, Historiographical and Educational Issues in Collecting Oral Testimonies*, in Yanes-Cabrera, Meda, Viñao (edd.), *School Memories. New Trends in the History of Education*, cit., pp. 157-164; E. Macinai, S. Oliviero, *Stories of school and childhood: video testimonies for a bottom-up narrative*, «Historia y Memoria de la Educación», n. 5, 2017, pp. 489-502; P. Zamperlin, *Le fonti orali e i Musei dell'educazione. A proposito di un recente convegno*, «Studium Educationis», n. 3, 2011, pp. 147-150; A. Augschöll Blasbichler, L. Flepp, E. Steiner, D. Cerny, G.P. Curcio, A. Metry (edd.), *Schule, Ausbildung und Beruf im alpinen Raum. Berufsbiographische Porträts von Südtiroler, Bündner und Walliser Lehrpersonen, aufgezeichnet von Studierenden*, Brixen, Weger, 2013; L. Paciaroni, *Memorie di scuola. Contributo a una storia delle pratiche didattiche ed educative nelle scuole marchigiane attraverso le testimonianze di maestri e maestre (1945-1985)*, Macerata, eum, 2020.

⁵ Si ricorda, per esempio, la costituzione dell'Associazione Italiana di Storia Orale nel 2006 ma anche il premio SISSCO (Società Italiana per lo Studio della Storia Contemporanea) più volte attribuito a studi basati sulle fonti orali e incentrati sui temi della soggettività e della memoria.

⁶ Il documento è stato pubblicato sul sito dell'AISO: www.aisoitalia.org/buone-pratiche/ (ultimo accesso: 14.03.2021). Per un approfondimento si vedano: B. Bonomo, A. Casellato, R. Garruccio, «Maneggiare con cura». *Un rapporto sulla redazione delle Buone pratiche per la storia orale*, «Il mestiere di storico», vol. VIII, n. 2, 2016, pp. 5-21; B. Bonomo, *Le «Buone pratiche» AISO: il quadro internazionale delle linee guida per la storia orale*, in A. Casellato (ed.), «Buone pratiche di storia orale: questioni etiche, deontologiche, giuridiche». *Atti del convegno, Trento, 13-14 novembre 2015*, «Archivio Trentino», n. 1, 2016, pp. 125-134.

⁷ Si fa riferimento al Regolamento (UE) 2016/679.

L'intervento di Bonomo ha permesso di riflettere su una delle tematiche del progetto PRIN, il quale prevede la realizzazione di una mediateca digitale – curata dall'unità di ricerca dell'Università di Firenze – contenente un repertorio elettronico di video testimonianze di insegnanti, studentesse e studenti, educatrici e educatori, direttori didattici e ispettori scolastici, ma anche di altri operatori della scuola e dell'educazione.

Le memorie degli insegnanti sono state il punto di partenza dell'intervento di Monica Galfré, la quale si è soffermata sul tema *Scuola memoria storia*. La studiosa ha proposto una riflessione richiamando due testi dedicati alla storia della scuola ricostruita proprio attraverso le memorie di insegnanti: *Colletto bianco, grembiule nero* di Marcello Dei⁸ e *La republique des instituteurs* di Jacques Ozouf e Mona Ozouf⁹.

In entrambi i lavori, ha sottolineato la Galfré, emerge come gli insegnanti siano stati considerati testimoni attendibili della storia negli anni Novanta, periodo in cui si registrava «una vera e propria esplosione memoriale» ma era ancora forte la diffidenza da parte degli storici nei confronti della memoria e del suo uso nella ricerca.

Le ricerche in questione restituiscono risultati molto interessanti che mettono in luce aspetti legati all'esercizio concreto del mestiere destinati altrimenti «a rimanere nell'ombra dell'aula», ma rivelano anche «quanto potesse essere inquinante la memoria», soprattutto in merito al focus dei due volumi, ossia il comportamento politico degli insegnanti. Si parla di «memoria inquinante», ha chiarito la Galfré, in quanto «vi prevalevano le testimonianze e le ricostruzioni in chiave positiva e risolta», ma anche perché entrambi i volumi – costruiti sulla base di questionari inviati e riempiti in periodi molto particolari della storia italiana e francese – «rivelavano che il presente, con i suoi problemi e le sue domande, finiva in qualche modo per sovrapporsi al passato».

La Galfré ha evidenziato come l'esperienza vissuta sia diventata quasi preponderante rispetto all'esperienza trasmessa fino quasi a sovrapporsi e a sostituire la storia, «quasi che la memoria fosse una sorta di via di accesso al passato più diretta, più efficace, più autentica». La memoria rappresenta un valido ausilio per sopperire ai vuoti storiografici sulla cultura e sulla quotidianità della scuola, in grado di far accedere lo storico a risorse inesplorate, ma – ha chiarito la studiosa – non è mai autorizzata a sostituire la storia. Lo storico della scuola del Novecento «non può eludere certamente il rapporto tra storia e memoria, il quale è caratterizzato da un intreccio indissolubile, tuttavia senza dimenticare che la storia è una cosa e la memoria è una fonte e, come tale, va trattata e va quindi sottoposta a una seria e rigorosa critica delle fonti»¹⁰.

⁸ M. Dei, *Colletto bianco, grembiule nero: gli insegnanti elementari italiani tra l'inizio del secolo e il secondo dopoguerra*, Bologna, il Mulino, 1994.

⁹ J. Ozouf, M. Ozouf, *La republique des instituteurs*, Paris, Gallimard, 1992.

¹⁰ Sul rapporto tra storia e memoria, si vedano: J. Le Goff, *Storia e memoria*, Torino, Einaudi, 1982; P. Nora, *Entre Mémoire et Histoire. La problématique des lieux*, in Id. (ed.), *Les lieux de*

Tra le fonti storiche va collocata anche la fotografia¹¹, come ben spiegato da Tiziana Serena nel suo intervento sul tema *Memoria prêt-à-porter? Problemi di metodo e d'interpretazione della fotografia come fonte* evidenziando come «la fotografia ‘indossi’ le vesti della fonte storica ma è anche un atto di memoria che si attua proprio nel presente, quindi è una costruzione che sta nella dimensione soggettiva».

Serena, ripercorrendo la storia e l'evoluzione della fotografia, si è soffermata sul periodo tra la fine dell'Ottocento e l'inizio del Novecento, quando l'iconografia scolastica entra nella esperienza fotografica. Serena ha proposto un'analisi delle fotografie di scuola – selezionate dal sito dell'Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa (INDIRE)¹² – facendo riferimento a una serie di “buone pratiche” relative all'analisi delle fonti fotografiche, al trattamento e alla comunicazione. Attraverso una serie di domande, è possibile indagare innanzitutto sulla fonte, quindi l'oggetto fotografico e sulla relazione fra il piano bidimensionale dell'immagine con l'oggetto fotografico nella sua complessità, ma anche su altri elementi, riguardanti l'autore, la committenza e la memoria. Serena ha concluso il suo intervento con un'ultima domanda, relativa all'area storiografica e critica: «come è possibile gestire il passaggio di livello da una memoria *prêt-à-porter*, taglia unica, a una memoria – oppure fonte, testimonianza –, ma non ancora storia, in grado di restituire lo spessore dell'ambiente simbolico ma anche di restituire la soggettività, di restituire la complessità, oltre il piano della mera raffigurazione figurativa?».

mémoire, Paris, Gallimard, 1984, Vol. I, pp. XVI-XLII.

¹¹ Nell'ambito della ricerca storico-educativa si ricordano alcuni studi condotti sulle fonti fotografiche: 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; F. Comas Rubí, X. Motilla Salas, B. Sureda Garcia (edd.), *Fotografía i Historia de l'educació. Iconografia de la modernització educativa*, Mallorca, Lleonard Muntaner, 2012; M. del Mar del Pozo Andrés, *Imágenes e historia de la educación: construcción, reconstrucción y representación de las prácticas escolares en el aula*, «Historia de la educación. Revista interuniversitaria», n. 25, 2006, pp. 291-315; S. Braster, *Educational Change and Dutch Classroom Photographs. A Qualitative and Quantitative Analysis*, in S. Braster, I. Grosvenor, M. del Mar Del Pozo Andrés (edd.), *The Black Box of Schooling. A Cultural History of the Classroom*, Bruxelles, P.I.E. Peter Lang, 2011, pp. 21-37; M. del Mar del Pozo Andrés, T. Rabazas Romero, *Las imágenes fotográficas como fuente para el estudio de la cultura escolar: precisiones conceptuales y metodológicas*, «Revista de ciencias de la educación», n. 231-232, 2012, pp. 401-414; I. Grosvenor, *The School Album: issues, histories and inequalities*, «Educació i Historia», n. 15, 2010, pp. 149-164.

¹² Le foto sono state selezionate nella sezione dedicata al progetto “FOTOEDU - Archivi fotografici per la storia della scuola e dell'educazione”: www.indire.it/progetto/fotoedu/ (ultimo accesso: 16.03.2021).

I tre interventi hanno rappresentato – come evidenziato dal coordinatore del progetto Roberto Sani – un momento costruttivo che ha stimolato le riflessioni proposte nella seconda sessione dedicata al tema *Le banche dati per la storia della scuola: stato dell'arte e prospettive di ricerca*, nella quale si sono susseguiti interessanti interventi sulla memoria scolastica, intesa come pratica individuale, collettiva e pubblica di rievocazione d'un comune passato scolastico¹³.

I relatori hanno presentato le attività di censimento e di catalogazione delle singole fonti riconducibili alle tre tipologie di memoria scolastica e che saranno inserite in apposite banche dati consultabili sul sito web www.memoriascolastica.it.

Il primo intervento (*Le fonti cinematografiche e televisive per la ricostruzione della memoria scolastica*) è stato di Paolo Alfieri, il quale ha presentato il lavoro svolto dall'unità di ricerca dell'Università Cattolica del Sacro Cuore di Milano sulla banca dati degli audiovisivi sulla scuola e sugli insegnanti prodotti e distribuiti in Italia nel corso del XX secolo¹⁴.

Come evidenziato da Alfieri, attraverso questa ricerca, si intende documentare come il cinema e la televisione abbiano rappresentato la scuola del passato analizzando molteplici tematiche. Tra queste, ad esempio, lo studio delle trasposizioni cinematografiche e/o televisive di alcune opere letterarie che parlano di scuola¹⁵ e la storia della rappresentazione del passato scolastico nel cinema e nella televisione, che può essere ricostruita secondo diverse direttrici, come quella che studia l'immagine degli insegnanti rispetto alla loro condizione sociale¹⁶ ma anche rispetto agli stereotipi di genere e/o di ruolo attribuiti agli stessi insegnanti e al personale scolastico.

All'unità di ricerca dell'Università di Macerata è stata invece affidata la banca dati inerente le varie forme di memoria pubblica relativa a educatori e insegnanti operanti nelle scuole italiane di ogni ordine e grado, ma anche a pedagogisti e funzionari dell'amministrazione scolastica centrale e periferica¹⁷. Il lavoro è

¹³ Sul tema della memoria scolastica si veda: Yanes-Cabrera, Meda, Viñao (edd.), *School Memories. New Trends in the History of Education*, cit.

¹⁴ La banca dati degli audiovisivi sulla scuola e sugli insegnanti è curata dall'unità di ricerca dell'Università Cattolica del Sacro Cuore di Milano in collaborazione con la sotto-unità di ricerca dell'Università degli Studi di Padova. Per un maggiore approfondimento sul tema, si veda: P. Alfieri (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, Roma, Armando Editore, 2019.

¹⁵ Sul tema si ricordano, in particolare, A. Debè, *Costruire la memoria: la scuola italiana degli anni Settanta nello sceneggiato televisivo Diario di un maestro*, in Alfieri (ed.), *Immagini dei nostri maestri*, cit., pp. 77-97; S. Polenghi, *La scuola di ieri "vista" oggi. Le trasposizioni filmiche del libro Cuore nell'Italia repubblicana (1948-2001)*, in *ibid.*, pp. 19-52.

¹⁶ Si pensi, ad esempio, ai celebri film *Il maestro...* di Aldo Fabrizi o *Il maestro di Vigevano* di Elio Petri, tratto dall'omonimo romanzo di Lucio Mastronardi.

¹⁷ Sul tema della memoria pubblica si veda: M. Brunelli, J. Meda, L. Pomante (edd.), *Memories and Public Celebrations of Education in Contemporary Times*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 9-394; sul tema dell'intitolazione di vie, piazze e/o edifici scolastici a figure di spicco della pedagogia e della scuola si ricordano: M. D'Ascenzo,

stato presentato da Fabio Targhetta e Valentino Minuto nell'intervento *Lapidi, statue, francobolli e monete come fonti storiche per la memoria pubblica della scuola*, nel quale è stato messo in luce come gli artefatti diffusi nello spazio antropico siano nati con il compito di fissare la memoria pubblica della scuola e dell'educazione nel paesaggio urbano entrando così a pieno titolo nelle cosiddette «politiche della memoria»¹⁸.

Le opere lapidee e scultoree – ha chiarito Minuto – sono dispositivi particolarmente adatti nel veicolare gli orientamenti politico-culturali della classe dominante e possono essere considerate come «una sorta di capsule del tempo che contengono informazioni che vengono messe, anche a grande distanza di tempo, a servizio della posterità».

Stefano Oliviero ha ben spiegato nel suo intervento *Le fonti orali e digitali: memoria e public history della scuola* il lavoro svolto dall'unità di ricerca dell'Università di Firenze, che ha visto coinvolti anche studenti e studentesse che hanno già raccolto un numero significativo di testimonianze¹⁹.

Oliviero ha invitato a riflettere su quanto la condivisione, la possibilità di pensare alla propria esperienza in un ambito ben preciso, abbia dato l'opportunità agli intervistati di capire quanto sia stata centrale l'esperienza di scuola nelle loro vite ma, in particolare, su quanto questa riflessione possa essere utile a chi fruisce della fonte «per capire e interpretare la scuola di oggi, la complessità, ma anche quella crisi identitaria della scuola che perlomeno dagli anni Settanta-Ottanta del secolo scorso l'ha caratterizzata come la perdita di centralità». Oliviero ha quindi sottolineato l'importanza del ricordo di scuola che «può fornire una lettura della scuola che è stata, ma anche di quella che è, e condiziona fortemente la lettura della scuola del presente».

Tra le fonti storiche per la memoria pubblica della scuola, si devono considerare anche le onorificenze conferite a esponenti e istituzioni del mondo della scuola e dell'educazione, quindi medaglie, decorazioni, diplomi e onorificenze scolastiche concesse da istituzioni pubbliche nazionali e locali e da istituzioni private a insegnanti operanti nelle scuole italiane di ogni ordine

Creating Places of Public Memory through the Naming of School Buildings: a case study of urban school spaces in Bologna in the 19th and 20th centuries, «El Futuro del Pasado», n. 7, 2016, pp. 441-458; M. Morandi, *Local e nation building nelle targhe degli istituti scolastici postunitari: un percorso di ricerca*, in M. Ferrari, M. Morandi (edd.), *Documenti della scuola tra passato e presente. Problemi ed esperienze di ricerca per un'analisi tipologica delle fonti*, Azzano San Paolo, Junior, 2007, pp. 41-53; M. Morandi, *Scuola è un nome femminile. Riflessioni intorno alle scelte denominative delle scuole normali in età liberale*, in C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, SEI, 2008, pp. 123-133.

¹⁸ Per un approfondimento sul tema del ruolo del paesaggio urbano e naturale, mediato dalla cultura scolastica, con particolare riferimento ai processi di formazione dell'identità nazionale, si veda: F. Targhetta, *Un paese da scoprire, una terra da amare. Paesaggi educativi e formazione dell'identità nazionale nella prima metà del Novecento*, Milano, FrancoAngeli, 2020.

¹⁹ Sul tema della *public history* si veda: G. Bandini, S. Oliviero (edd.), *Public History of Education: riflessioni, testimonianze, esperienze*, Firenze, Firenze University Press, 2019.

e grado, oltre che a dirigenti e funzionari dell'amministrazione scolastica e a municipi²⁰.

Alberto Barausse e Michela D'Alessio hanno approfondito il tema nell'intervento *Medaglie e benemerenze: le onorificenze come fonti storiche per la memoria pubblica della scuola*²¹ nel quale hanno specificato come un'attenta e approfondita ricerca in varie sedi, sia a livello centrale che locale, consenta di individuare i contesti all'interno dei quali tali onorificenze sono state conferite, come i congressi pedagogici, le commemorazioni celebrative e le esposizioni didattiche fino ad arrivare al conferimento delle benemerenze da parte dei ministeri. Inoltre, è anche possibile identificare i soggetti destinatari delle benemerenze che comprendono insegnanti di ogni ordine e grado, i direttori e le direttrici didattici, gli ispettori e le ispettrici, i provveditori e i comuni benemeriti.

Una risorsa preziosa è poi rappresentata dalle fonti normative – come ha evidenziato Barausse – in quanto permettono di individuare le molteplici tipologie di onorificenze e di risalire, quindi, alle origini del discorso premiale. D'Alessio ha messo in evidenza come tale ricerca consenta di ricostruire i tratti distintivi di quello che era il profilo degli educatori, «proprio nell'ottica interpretativa di quale sia stata l'evoluzione del modello di insegnante della scuola e della rappresentazione che ha determinato il conferimento di queste medaglie».

Anche le opere letterarie che contengono narrazioni della realtà scolastica, degli alunni, degli insegnanti e della quotidianità educativa rappresentano una fonte significativa. Carmela Covato nel suo intervento – *La memoria scolastica ed educativa nelle fonti letterarie* – ha sottolineato come le fonti letterarie costituiscano un contenitore molto ampio ed è quindi stato costruito un indice ragionato di tutte le opere letterarie che era opportuno considerare, nel quale sono state inserite opere in cui la scuola appare come protagonista – per esempio *Il romanzo d'un maestro* di Edmondo De Amicis – oppure «in cui la scuola è inserita in una trama narrativa più vasta e diventa protagonista in quanto rappresenta l'angolo visuale di chi scrive da cui analizzare la realtà» – come in *L'esclusa* di Pirandello o *La storia* di Elsa Morante. E, ancora, quelle opere che hanno uno scopo autobiografico, che spesso si lega a un intento di denuncia sociale²².

²⁰ La Banca dati delle onorificenze conferite a esponenti e istituzioni del mondo della scuola e dell'educazione è curata dalle sotto-unità di ricerca delle Università degli Studi del Molise e della Basilicata.

²¹ Sul tema si veda: A. Barausse, «Ricambiare l'amore che portano all'educazione...». *Public memory and awards of honour of public education in Italy from the Unification to the end of the 19th Century (1861-1898)*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 185-205; Brunelli, Meda, Pomante (edd.), *Memories and Public Celebrations of Education in Contemporary Times*, cit.

²² Si pensi, ad esempio, alle opere di denuncia della condizione sociale femminile. Per un'analisi più completa sul tema donne e educazione si vedano: S. Soldani (ed.), *L'educazione delle donne*.

L'intento dell'unità di ricerca dell'Università degli Studi Roma Tre è dunque quello di «cogliere nei testi letterari quei momenti di svolta nella rappresentazione dell'identità dell'istituzione scolastica, del ruolo insegnante, della sua funzione sociale, che non corrisponde a svolte legislative ufficiali o politiche ma che, invece, contiene al suo interno un mutamento nella rappresentazione, ma pensata come autorappresentazione, così come il genere letterario esprime».

La memoria scolastica e educativa nelle fonti diaristiche è stato il filone di ricerca presentato da Francesca Borruso, che intende porre l'attenzione sui diari di scuola editi e inediti e sulle autobiografie inedite redatte da insegnanti e relativi ad esperienze educative e di insegnamento realizzate nella scuola pubblica o privata²³.

I diari dei maestri, come sottolineato dalla Borruso, sono una fonte della storia della scuola estremamente complessa da interpretare e che richiede un rigore metodologico severo, in quanto fonte autobiografica. La Borruso ha innanzitutto specificato le varie declinazioni di diario, distinguendo tra diario di scuola, che è quello istituzionale, «spesso espressione di una volontà da parte della scuola», scrittura privata, quindi autobiografica in cui l'insegnante racconta la sua esperienza didattica e si inserisce nell'ambito di un'esperienza di vita, e i diari che nascono proprio dal tentativo di preparare una o più lezioni²⁴.

L'analisi dei diari scolastici apre diversi scenari di ricerca, ma in particolare è interessante concentrarsi sulla permeabilità della scuola alle ideologie dominanti, ovvero sulla permeabilità della scuola a idee pedagogiche innovative, anticipatrici, nuove rispetto all'ideologia dominante. In questo modo, è possibile scoprire anche come molte scuole rurali o poco note abbiano costituito cantieri di altissimo valore culturale e formativo.

Tra le fonti analizzate, anche le illustrazioni relative alla vita scolastica presenti nell'editoria per e sull'infanzia e l'adolescenza e le opere d'arte sulla scuola²⁵. A presentare il lavoro sul tema della memoria scolastica ed educativa nelle fonti artistiche, svolto dall'unità di ricerca dell'Università Roma Tre, è stato Lorenzo Cantatore, il quale ha sottolineato l'importanza di elaborare una scheda catalografica articolata in cui distinguere tra le illustrazioni, «documenti

Scuole e modelli di vita femminile nell'Italia dell'Ottocento, Milano, FrancoAngeli, 1989; S. Ulivieri (ed.), *Educazione al femminile. Una storia da scoprire*, Milano, Guerini, 2007; C. Covato, *Un'identità divisa. Diventare maestra in Italia fra Otto e Novecento*, Roma, Archivio Guido Izzi, 1996; Ead., *Maestre d'Italia. Uno sguardo sull'Italia liberale*, «Storia delle donne», n. 8, 2012, pp. 165-184; A. Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, Macerata, eum, 2012.

²³ La banca dati dei diari di scuola e delle autobiografie è curata dall'unità di ricerca dell'Università degli Studi Roma Tre, in collaborazione con la sotto-unità di ricerca dell'Università degli Studi di Torino.

²⁴ Sui diari degli insegnanti, si ricorda, ad esempio: F. Borruso (ed.), *Rina Nigrisoli, La mia scuola*, Milano, Unicopli, 2011.

²⁵ Per un approfondimento sulla «memoria visuale della scuola», si veda: E. Colleldemont, *La memoria visual de la escuela*, «Educatio Siglo XXI», vol. XXVIII, n. 2, 2010, pp. 133-156.

fortemente impattanti sulla divulgazione-formazione dell'immagine di scuola in quanto prodotti per lo più di consumo e di comunicazione popolare» e fonti artistiche, intese in senso più tradizionale, come la pittura, il quadro, l'affresco, rivolte a un circuito di fruitori più ridotto ed elitario.

La ricerca ha avuto come fonti principali di reperimento dei documenti la biblioteca personale di Antonio Faeti a Bologna, il Museo della scuola e dell'educazione «Mauro Laeng» e la Biblioteca Centrale Ragazzi di Roma e ha preso in considerazione tre macro fasce cronologiche, il primo cinquantennio postunitario che «segna il passaggio dai figurinai agli illustratori e dal bianco e nero al colore»²⁶, gli anni dal 1910 al 1950, caratterizzati da una importante rivoluzione grafica, stilistica e tecnica e, infine, il periodo dagli anni Cinquanta al 2000, «in cui assistiamo alla piena maturazione di quello che oggi chiamiamo albo illustrato».

A concludere il ricco pomeriggio è stato Giuseppe Zago presentando il lavoro svolto dall'unità di ricerca dell'Università di Padova incentrato sull'evoluzione e sulla rappresentazione del dirigente scolastico. Sono stati presi in considerazione alcuni casi emblematici «per mettere a confronto la realtà, la rappresentazione e i criteri di rappresentazione», cercando di porre in evidenza perché e come veniva rappresentata la dirigenza nelle varie stagioni e nei diversi ordini di scuola, ma anche di cogliere l'immagine che emerge dalla normativa e quella che, invece, risulta dalla realtà.

Il gruppo di ricerca ha cercato di ricostruire la memoria collettiva e pubblica della dirigenza scolastica attraverso tre fonti: la memoria collettiva con i necrologi²⁷, la memoria pubblica con le onorificenze e, infine, la memoria letteraria attraverso romanzi e racconti di vita scolastica.

A chiudere la ricca e intensa giornata è stato Roberto Sani, il quale ha richiamato l'attenzione sulle finalità del progetto che impegna gli storici a esplorare le tematiche della memoria scolastica ed educativa per offrire un'immagine ricca e articolata di come essa possa essere letta e recuperata, «tentando di capire ciò che l'oggi sa o crede di sapere della scuola del passato e quanto quello che sa corrisponda alla realtà oppure sia frutto di pregiudizi e stereotipi ormai radicati nel senso comune e difficili da estirpare».

Infine, è stata annunciata la *call for papers* in vista del convegno internazionale del PRIN «The School and Its Many Pasts. School Memories between Social Perception and Collective Representation», che si terrà il 12, 13 e 14 dicembre 2022 a Macerata, in occasione del quale i membri del progetto sono chiamati

²⁶ Per un maggiore approfondimento, si ricordano: A. Faeti, *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, Torino, Einaudi, 1972; A. Rauch, *Il racconto dell'illustrazione. Grandi illustratori e personaggi dell'immaginario tra la metà dell'Ottocento e la fine del Novecento*, Firenze-Lucca, La casa Usher, 2019.

²⁷ Sul tema dei necrologi, si veda: 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.

a ricostruire in maniera organica la genesi e le caratteristiche del processo che porta alla creazione della memoria scolastica e educativa. Il convegno – ha concluso Sani – dovrà costituire «il biglietto da visita a livello nazionale e internazionale attraverso il quale offrire una riflessione nuova e significativa per la storia del nostro Paese».

Call for papers del convegno internazionale «The school and its many pasts. School memories between social perception and collective representation» (Macerata, 12-14 dicembre 2022)

Presentazione

La presente *call for papers* si inserisce all'interno delle attività di ricerca previste per il progetto di rilevante interesse nazionale *School Memories between Social Perception and Collective Representation (Italy, 1861-2001)* e si propone di proseguire il filone di ricerca inaugurato dal simposio internazionale *School Memories. New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues*, svoltosi a Siviglia nel 2015.

Il progetto di ricerca focalizza la sua attenzione sulle forme della memoria scolastica, intesa come pratica individuale, collettiva e pubblica di rievocazione d'un comune passato scolastico¹.

La memoria scolastica individuale consiste nell'auto-rappresentazione di sé fornita da ex-insegnanti ed ex-funzionari dell'amministrazione scolastica, così come da ex-alunni all'interno delle testimonianze orali e scritte (e.g. diari, autobiografie e memorialistica in genere). Gli ego-documenti sono stati ampiamente utilizzati come fonti storiche anche nell'ambito della ricerca storico-educativa² al fine di ricostruire la storia della scuola partendo dalle reali esperienze dei suoi protagonisti piuttosto che dalle fonti legislative e istituzionali, nel tentativo di aprire quella che è stata definita la «scatola nera della scuola»³.

¹ A. Nóvoa, *Ways of Saying, Ways of Seeing: Public Images of Teachers (19th-20th Century)*, «Paedagogica Historica», vol. XXXVI, n. 1, 2000, pp. 20-52; A. Escolano Benito, *Memoria de la educación y cultura de la escuela*, in J.M. Hernández Díaz, A. Escolano Benito (edd.), *La memoria y el deseo: cultura de la escuela y educación deseada*, Valencia, Tirant lo Blanch, 2002, pp. 19-42; C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017; S. Ramos Zamora, *Debates on Memory and the History of Education in the 21st Century*, «HSE – Social and Education History», vol. X, n. 1, 2021, pp. 22-46.

² A. Viñao Frago, *La memoria escolar: restos y huellas, recuerdos y olvidos*, «Annali di Storia dell'Educazione e delle Istituzioni Scolastiche», n. 12, 2005, pp. 19-33.

³ D. Julia, *La culture scolaire comme objet historique*, «Paedagogica Historica», vol. XXXI, n. 1, 1995, pp. 353-382.

La memoria scolastica collettiva si compone invece delle molteplici rappresentazioni che nel corso del tempo della scuola, degli insegnanti e delle stesse scolaresche hanno offerto l'industria culturale (letteratura, cinematografia, musica, etc.) e il mondo dell'informazione ed è soggetta a sensibili trasformazioni. Tali rappresentazioni del passato educativo si stratificano di generazione in generazione, sovrapponendosi in parte ai ricordi personali, adulterando la realtà dei fatti e consolidandosi in narrazioni stereotipate. Esse possono anche alterare la conoscenza del passato, che si trasforma quindi in un vero e proprio spazio dell'immaginario, dal quale una ricostruzione storica scientificamente fondata non può prescindere⁴.

La memoria scolastica pubblica, infine, consiste nella rappresentazione che della scuola e degli insegnanti è stata proposta nell'ambito delle rappresentazioni ufficiali e delle commemorazioni pubbliche promosse dalle istituzioni locali e nazionali in base ad una precisa politica della memoria, ovvero ad un uso pubblico del passato finalizzato ad acquisire consenso e a rafforzare il sentimento d'appartenenza ad una determinata comunità⁵. Diversamente dalla memoria scolastica individuale, quella collettiva e quella pubblica sono state scarsamente oggetto della ricerca storico-educativa, in quanto non sono state a lungo considerate un soggetto storiograficamente rilevante.

In anni recenti, tuttavia, la memoria della scuola – considerata nelle sue varie accezioni – è stata inclusa nella riflessione storiografica internazionale ed essa è stata fatta oggetto di studi di notevole interesse nell'ambito della storia dell'educazione tanto nei paesi dell'area ibero-americana, quanto nel mondo anglosassone.

Lo studio della memoria consente, in particolare, di definire il modo in cui il presente guarda al passato e lo interpreta o re-interpreta. In questo senso, la memoria scolastica non ci interessa solo come canale di accesso al passato scolastico, ma come chiave per capire ciò che l'oggi sa o crede di sapere della scuola del passato e quanto quello che sa corrisponde alla realtà oppure è frutto di pregiudizi e stereotipi ormai inveterati nel senso comune e difficili da estirpare.

L'oggetto dell'indagine storica, pertanto, non consiste più semplicemente nella scuola come realmente è stata, ma nel complesso processo di definizione del sentimento che di quella scuola è stato elaborato nel corso del tempo a livello individuale e collettivo inizialmente sulla base dell'esperienza scolastica reale e quindi sulla base di altri agenti sociali e culturali che hanno contribuito in parte a rideterminarlo.

⁴ P. Alfieri (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, Roma, Armando Editore, 2019.

⁵ P. Caspard, *L'historiographie de l'éducation dans un contexte mémoriel. Réflexion sur quelques évolutions problématiques*, «Histoire de l'Éducation», n. 121, 2009, pp. 67-82; Yanes-Cabrera, Meda, Viñao (edd.), *School Memories. New Trends in the History of Education*, cit.

Questa nuova prospettiva di ricerca consente di prendere in esame un aspetto la cui dimensione storica era fino ad oggi sfuggita agli addetti ai lavori: l'evoluzione della percezione dello status sociale dei diversi profili professionali coinvolti nei processi di scolarizzazione e dello statuto pubblico dell'istruzione all'interno di una collettività, così come dell'immagine pubblica della scuola e del sistema scolastico nazionale. Studiare le modalità di rappresentazione simbolica collettiva della scuola e dell'insegnamento nel corso del tempo, infatti, oltre a restituirci la dimensione culturale complessiva di questi fenomeni storici, aiuterà a definire l'origine di alcune ipoteche gravanti ancora oggi sull'immagine pubblica della scuola, nonché a restituire a tutti gli attori dell'istruzione pubblica consapevolezza di sé e del proprio ruolo.

Non esiste un unico e univoco passato scolastico. Ne esistono piuttosto molteplici, che spesso convivono, altre volte sono alternativi gli uni agli altri. Essi possono essere più o meno conformi alla realtà storica, ma cionondimeno sono reali e influiscono sulla visione che le singole persone o le comunità hanno di quel passato. Questa conferenza internazionale punta alla scoperta di questi passati scolastici.

Tematiche

Si propongono qui di seguito una serie di possibili tematiche di ricerca, attorno alle quali i colleghi potranno costruire le loro proposte di intervento:

– riflessioni di carattere storiografico e metodologico in relazione allo studio della memoria e della commemorazione della scuola (quali potenzialità? quali rischi? quale rapporto tra sapere storico e altri saperi impegnati nell'analisi della complessa «fenomenologia della memoria»? quali le possibili mutazioni epistemologiche e metodologiche e quali le possibili derive? dove arriva la ricostruzione storica e dove inizia la mitizzazione? è utile ribadire come al fine di studiare correttamente le molteplici rappresentazioni del passato scolastico è necessario partire da un'approfondita conoscenza di quello stesso passato, che non può che essere fondata sulla preliminare penetrazione fino al «duro nocciolo rappresentato dai fatti»⁶ attraverso una rigorosa ricerca storica, suffragata anche dal ricorso alle fonti tradizionali; si potranno inoltre evidenziare i benefici derivanti alla storia dell'educazione dall'adozione di un approccio di *Public History*⁷, in modo tale che la conoscenza storica prodotta in sede scientifica possa essere effettivamente messa in contatto con i contesti sociali più ampi, in modo da rispondere ai bisogni culturali latenti o emergenti);

⁶ E. Carr, *Sei lezioni sulla storia*, Torino, Einaudi, 1961.

⁷ G. Bandini, S. Oliviero (edd.), *Public history of education: riflessioni, testimonianze, esperienze*, Firenze, Firenze University Press, 2019.

– la «memoria visuale della scuola»⁸ si compone della memoria indiretta della scuola del passato in noi generata dalle rappresentazioni pittoriche, grafiche e fotografiche che di essa sono state realizzate nel corso del tempo⁹, così come pure dalle illustrazioni presenti nelle opere letterarie per adulti e per bambini e nell'editoria scolastica (quale rappresentazione della scuola di un determinato periodo storico è offerta dalle arti visive? l'idea che di quella scuola è fornita corrisponde effettivamente alla realtà storica? altre fonti sono gli album fotografici¹⁰, così come la ritrattistica scolastica e le «foto del primo giorno di scuola»¹¹ nell'ambito della memoria individuale e quelle della vita scolastica quotidiana o dei suoi momenti più emblematici e rituali riprodotte in determinati contesti pubblici – e.g. mostre – con precise finalità rievocative e iconogenetiche nell'ambito della memoria collettiva);

– la memoria del sé attraverso le testimonianze orali¹², i diari, le autobiografie e la memorialistica che costituiscono l'ampia gamma di «ego-documenti» i quali consentono allo storico di indagare i contesti scolastici con i vissuti esperienziali di insegnanti e studenti e le reali pratiche educative svolte in classe, composte anche dalle *routine* educative portate avanti per inerzia al di là del loro naturale termine di decadimento, dalle cosce infrazioni dei divieti imposti dalle autorità scolastiche, dalla capacità di resilienza degli insegnanti nei confronti di riforme radicali della scuola e dai tabù pedagogici di ogni genere, frantumando la stereotipata immagine pubblica della scuola diffusa ad arte dalle istituzioni;

– forme e modalità di rappresentazione simbolica collettiva della scuola e dell'insegnamento nel corso del tempo (evoluzione dell'immagine pubblica della scuola da luogo di crescita civile, progresso culturale e riscatto sociale a istituzione antiquata, «luogo non sicuro», «rifugio di perdigiorno senza prospettive» e «parcheggio per i figli» analizzandone le possibili cause; evoluzione della percezione collettiva del ruolo e delle finalità dell'istruzione e della percezione dello status sociale degli insegnanti e della funzione pubblica da essi esercitata nelle scuole di ogni ordine e grado; narrazioni divulgative

⁸ E. Colledemont, *La memoria visual de la escuela*, «Educatio Siglo XXI», vol. XXVIII, n. 2, 2010, pp. 133-156.

⁹ I. Grosvenor, M. Lawn, K. Rousmaniere, *Imaging Past Schooling: the Necessity for Montage*, «Review of Education, Pedagogy and Cultural Studies», vol. XXII, n. 1, 2000, pp. 71-85; I. Dussel, K. Priem (edd.), *Images and Films as Objects to Think With: a Reappraisal of Visual Studies in Histories of Education*, special issue, «Paedagogica Historica», vol. LIII, n. 6, 2017, pp. 641-750.

¹⁰ I. Grosvenor, *The School Album: issues, histories and inequalities*, «Educació i Historia», n. 15, 2010, pp. 149-164.

¹¹ S. Wagnon, *La photographie de classe dans l'école française: une source sous-estimée de compréhension de l'histoire de l'école, interface entre sphères privée et publique (XIX^e-XXI^e)*, «Encounters in Theory and History of Education», n. 17, 2016, pp. 27-47.

¹² P. Gardner, P. Cunningham, *Oral History and Teachers' Professional Practice: a wartime turning point?*, «Cambridge Journal of Education», vol. XXVII, n. 3, 1997, pp. 331-342.

del passato scolastico e creazione di immagini stereotipate e nostalgiche di un passato in cui la scuola era apoditticamente migliore (ma era realmente così?)¹³;

– la rappresentazione del passato scolastico proposta nelle opere letterarie, nell’immaginario e nella narrativa di carattere popolare, al cinema, in radio e in televisione (quale idea di scuola così come quale modello di insegnante e di studente – ma anche di direttore didattico e ispettore scolastico – propongono romanzi, racconti, novelle, pellicole cinematografiche, sceneggiati televisivi e trasmissioni radiofoniche, popolarizzandoli e facendoli filtrare nell’immaginario collettivo? in base a quali fattori l’immagine degli uni e degli altri varia da positiva a negativa? quale rapporto si stabilisce fra vissuti individuali e codificazioni sociali? come sono affrontate le questioni concernenti ad esempio la discriminazione religiosa, politica e di genere?); allo stesso modo, è interessante approfondire anche la rappresentazione del passato scolastico proposta dalla comunicazione pubblicitaria, dalle cronache giornalistiche pubblicate sulla stampa quotidiana e periodica, così come da documentari, inchieste e programmi di approfondimento televisivi;

– rappresentazioni ufficiali e commemorazioni pubbliche promosse dalle istituzioni locali e nazionali in base ad una precisa politica della memoria, ovvero ad un uso pubblico del passato¹⁴ (centenari e ricorrenze intermedie dell’entrata in vigore di leggi fondamentali così come dell’istituzione di ordini e gradi d’istruzione, e giubilei universitari; centenari di grandi autori della letteratura per l’infanzia, delle loro opere e delle loro creature più famose; realizzazione di statue e monumenti, così come di semplici targhe e lapidi, dedicati a figure di spicco della pedagogia e della scuola a livello nazionale e locale (comprese le cerimonie di disvelamento); conio di monete, banconote e serie numismatiche celebrative ed emissione di francobolli commemorativi di singole personalità del mondo della pedagogia e della scuola o di particolari ricorrenze relative alla pubblica istruzione; mostre ed esposizioni locali e nazionali dedicate alla storia della scuola; intitolazione di vie, piazze e/o edifici scolastici a figure di spicco della pedagogia e della scuola¹⁵, con particolare riferimento ai criteri di selezione adottati); il conferimento di onorificenze e l’attribuzione di medaglie e diplomi di benemerita al merito e alla memoria¹⁶ ad istituzioni municipali, scolastiche o associative nonché al personale docente e dell’amministrazione scolastica utili ai fini del riconoscimento professionale e dello status sociale del personale

¹³ C. Shaw, M. Chase (edd.), *The Imagined Past. History and Nostalgia*, Manchester, Manchester University Press, 1989.

¹⁴ M. Brunelli, J. Meda, L. Pomante (edd.), *Memories and Public Celebrations of Education in Contemporary Times*, special issue, «History of Education & Children’s Literature», vol. XIV, n. 1, 2019, pp. 9-394.

¹⁵ M. D’Ascenzo, *Collective and public memory on the walls. School naming as a resource in history of education*, «History of Education & Children’s Literature», vol. XII, n. 1, 2017, pp. 633-657.

¹⁶ A. Barausse, «Ricambiare l’amore che portano all’educazione...». *Public memory and awards of honour of public education in Italy from the Unification to the end of the 19th Century (1861-1898)*, «History of Education & Children’s Literature», vol. XIV, n. 1, 2019, pp. 185-205.

insegnante e dirigente delle scuole; la promozione di pratiche di socializzazione della memoria attraverso la costituzione di forme di associazionismo finalizzate a valorizzare i decorati e i benemeriti della scuola, componenti determinanti che hanno contribuito alla costruzione di una «comunità immaginata» per riprendere il concetto storiografico introdotto da Benedict Anderson¹⁷;

– i silenzi e gli oblii che pure – sulla scorta delle considerazioni di Marc Augé¹⁸ e Paul Ricœur¹⁹, secondo i quali l'oblio è parte integrante della memoria – sono frutto di una precisa politica della memoria, ovvero di un uso pubblico del passato (lacune e negligenze nella commemorazione pubblica della scuola, di cui sia possibile spiegare le cause; rimozione di determinati eventi della scuola del passato dalle celebrazioni pubbliche invalse fino a un determinato periodo sulla base di stravolgimenti politici e di significativi mutamenti di sensibilità collettiva; distruzione o ricollocazione in diversa sede di memoriali e monumenti, così come di semplici targhe e lapidi, dedicati a figure di spicco della pedagogia e della scuola a livello nazionale e locale);

– le celebrazioni funebri di illustri esponenti del mondo dell'istruzione e dell'educazione a livello locale e nazionale, promosse da parenti e amici come adempimento d'un obbligo privato e pubblicamente esplicitate al fine di sottolineare il ruolo da essi svolto nel progresso civile e culturale della società in cui operarono; quale modello di insegnante propongono i necrologi pubblicati sulle riviste scolastiche²⁰, le orazioni funebri pronunciate nel corso delle esequie pubbliche e gli opuscoli commemorativi stampati dai comitati per le onoranze a insegnanti defunti? per quanti pedagogisti ed educatori famosi sono stati celebrati funerali di stato e a quanti di essi sono stati dedicati mausolei e monumenti funebri all'interno di cimiteri monumentali e famèdi?;

– la realizzazione di veri e propri «luoghi della memoria scolastica»²¹, intesi come spazi materiali o simbolici in grado di generare memorie collettive in relazione alla scuola in generale o a singole esperienze educative (fondazione di musei della scuola e dell'educazione o dedicati a un pedagogista e/o educatore di particolare prestigio; realizzazione di scuole-museo, intese come luoghi di saldatura tra i comuni ricordi scolastici e le identità locali; valorizzazione di scuole storiche²²; musealizzazione di luoghi all'interno dei quali si sono

¹⁷ B. Anderson, *Imagined communities: reflections on the origin and spread of nationalism*, London-New York, Verso, 1983.

¹⁸ M. Augé, *Les formes de l'oubli*, Paris, Payot, 1998.

¹⁹ P. Ricœur, *La mémoire, l'histoire, l'oubli*, Paris, Éditions du Seuil, 2000.

²⁰ 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.

²¹ J. Meda, *The «Sites of School Memory» in Italy between memory and oblivion: a first approach*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 25-47; M. Lawn, *Building Ruins: Abandoned Ideas of the School*, in K. Darian-Smith, J. Willis (edd.), *Designing Schools, Space, Place and Pedagogy*, London-New York, Routledge, 2017, pp. 19-24.

²² M.d.M. Del Pozo Andrés, *Madrid, ciudad educadora. Memoria de la Escuela Pública*

compiute esperienze educative uniche e irripetibili e di case natali di pedagogisti ed educatori);

– la costruzione artificiosa, attraverso l’uso della categoria storiografica dell’«invenzione della tradizione», introdotta da Eric Hobsbawm e Terence Ranger²³, da parte di istituti d’istruzione superiore, collegi e università di veri e propri «miti fondativi» sulle proprie origini al fine di ostentare una lunga tradizione educativa in grado di affermarli nell’immaginario collettivo come prestigiosi ed esclusivi luoghi di formazione, legittimandone prerogative e funzioni²⁴; in tal senso, sarà interessante approfondire anche il ruolo giocato dagli annuari scolastici²⁵ e dalle associazioni degli ex-studenti di queste istituzioni nella costruzione di vere e proprie comunità di memoria, custodi di un patrimonio di storie e tradizioni in grado di generare duraturi sentimenti di identità;

– le cose hanno una memoria? i cimeli scolastici – conservati dagli istituti scolastici, in appositi musei o dai loro vecchi proprietari – sono sì oggetti della cultura materiale della scuola, ma anche veri e propri catalizzatori emozionali, in grado di rievocare istintivamente il passato scolastico dei singoli come di una comunità più ampia²⁶; in un’epoca nella quale si paventa ormai la scomparsa del futuro come orizzonte di senso delle nostre vite e ci si arrende alla «retrotopia» di Zygmunt Bauman²⁷, sempre di più dilaga – soprattutto nel campo dei consumi culturali – la «moda del passato», frutto delle rivendicazioni identitarie di gruppi sociali più o meno estesi, convinti di non aver ancora interamente assolto la propria «entelechia generazionale»²⁸ e inclini pertanto a recuperare il proprio passato, ri-attualizzandolo; è frutto di questo fenomeno socio-culturale, fondato sul sentimento della nostalgia e abilmente sfruttato dal «vintage marketing», il revival dei brand storici dell’industria scolastica, che a distanza di decenni tornano a fare tendenza.

(1898/1938), Madrid, Ayuntamiento de Madrid – Oficina de Derechos Humanos y Memoria, 2019.

²³ E. Hobsbawm, T. Ranger (edd.), *The Invention of Tradition*, Cambridge, Cambridge University press, 1983.

²⁴ R. Sani, *The Invention of Tradition in the Minor Universities of United Italy: the Case of the Thirteenth-century Origins of the Studium Maceratense*, «History of Education & Children’s Literature», vol. VII, n. 1, 2012, pp. 485-504.

²⁵ P. Dávila, L.M. Naya, J. Miguelena, *Yearbooks as a source in researching school practices in private religious schools*, «History of Education & Children’s Literature», vol. XV, n. 2, 2020, pp. 219-240.

²⁶ 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.M. Badanelli Rubio, M. Poveda Sanz, C. Rodríguez Guerrero (edd.), *Pedagogía museística: Prácticas, usos didácticos e investigación del patrimonio educativo. Actas de VI Jornadas Científicas de la Sociedad Española para el Estudio del Patrimonio Histórico Educativo*, Madrid, Universidad Complutense de Madrid, 2014, pp. 203-217.

²⁷ Z. Bauman, *Retrotopia*, Cambridge, Polity Press, 2017.

²⁸ K. Mannheim, *Das Problem der Generationen*, in Id., *Wissenssoziologie: Auswahl aus dem Werk*, Neuwied, Luchterhand, 1964, pp. 509-565.

Calendario

15 dicembre 2021: termine per l'invio delle proposte di comunicazione

31 gennaio 2022: comunicazione di accettazione o rifiuto delle proposte pervenute

12-13-14 dicembre 2022: celebrazione del congresso

15 febbraio 2023: termine per l'invio dei contributi definitivi da pubblicare negli atti del congresso.

Sede

Le sessioni della conferenza si terranno presso le sedi del Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo dell'Università degli Studi di Macerata.

Lingue

Le lingue ufficiali della conferenza saranno: francese, inglese, italiano, portoghese e spagnolo. I relatori si impegnano, tuttavia, a presentare la versione definitiva del proprio contributo in lingua inglese per la pubblicazione negli atti ufficiali della conferenza.

Iscrizione

Ogni studioso interessato a partecipare alla conferenza in qualità di relatore dovrà presentare una proposta (abstract) di max 3.000 battute (spazi inclusi), la quale dovrà includere: nome e cognome dell'/gli autore/i, affiliazione istituzionale, titolo della comunicazione e max. 5 parole chiave. Titolo, abstract e parole chiave dovranno essere caricati sia nella lingua utilizzata per la presentazione sia in lingua inglese.

La scadenza di consegna è fissata per il 15 dicembre 2021; la registrazione dovrà essere effettuata attraverso l'apposito Google Form presente nel sito web ufficiale del progetto <<http://www.memoriascolastica.it/>> alla sezione dedicata. Un'apposita Commissione di *referee* anonimi – nominata dalla presidenza del Comitato scientifico internazionale – valuterà le proposte presentate, tenendo conto della rilevanza tematica e della qualità scientifica. La segreteria organizzativa comunicherà agli interessati l'accettazione o meno delle loro proposte entro il 31 gennaio 2022.

Sarà ammessa la presentazione di massimo 2 comunicazioni per ogni relatore, ancorché in collaborazione con altri.

Le spese di viaggio saranno a carico dei relatori e non potranno essere rimborsate.

Pubblicazione degli Atti

Al termine della conferenza, i lavori presentati saranno pubblicati in volume con una casa editrice di alto profilo, in grado di garantirne la distribuzione a livello internazionale.

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- Università degli Studi del Molise, Italia
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Call for papers of the international conference «The school and its many pasts. School memories between social perception and collective representation» (Macerata, 12-14 december 2022)

Presentation

School Memories Between Social Perception and Collective Representation (Italy, 1861-2001). The intention is to continue the line of research inaugurated by the international symposium on *School Memories. New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues*, which took place in Seville in 2015.

The research project focuses on forms of school memory, understood as the individual, collective and public practice of remembering a common school past²⁹.

Individual school memory consists of self-representation supplied by former teachers, members of the school administration, and pupils through oral and written testimonies (e.g., diaries, autobiographies and memoirs in general). Ego-documents have also been widely used as historical sources in the field of historical-educational research³⁰ to reconstruct the history of schooling using the lived experiences of its protagonists rather than legislative and institutional sources, in an attempt to open what has been defined as the «black box of schooling»³¹.

²⁹ A. Nóvoa, *Ways of Saying, Ways of Seeing: Public Images of Teachers (19th-20th Century)*, «Paedagogica Historica», vol. XXXVI, n. 1, 2000, pp. 20-52; A. Escolano Benito, *Memoria de la educación y cultura de la escuela*, in J.M. Hernández Díaz, A. Escolano Benito (edd.), *La memoria y el deseo: cultura de la escuela y educación deseada*, Valencia, Tirant lo Blanch, 2002, pp. 19-42; C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017; S. Ramos Zamora, *Debates on Memory and the History of Education in the 21st Century*, «HSE – Social and Education History», vol. X, n. 1, 2021, pp. 22-46.

³⁰ A. Viñao Frago, *La memoria escolar: restos y huellas, recuerdos y olvidos*, «Annali di Storia dell'Educazione e delle Istituzioni Scolastiche», n. 12, 2005, pp. 19-33.

³¹ D. Julia, *La culture scolaire comme objet historique*, «Paedagogica Historica», vol. XXXI, n. 1, 1995, pp. 353-382.

Collective school memory, on the other hand, is composed of the many ways in which the culture industry (literature, cinema, music, etc.) and the world of information represent school time, teachers and pupils, and it is subject to appreciable transformations. These representations of school past become layered from generation to generation, partly superimposing themselves on personal memories, corrupting factual reality and consolidating themselves into stereotyped narrations. They may also alter our awareness of the past, which is thus transformed into a real space in our imagination that cannot be separated from scientifically-based historical reconstructions³².

Finally, public school memory consists of how schools and teachers are represented in official contexts and public commemorations promoted by local and national institutions based on a precise policy of memory, or public use of the past aimed at gaining consensus and reinforcing the feeling of belonging to a specific community³³. Unlike individual school memory, collective memory and public memory have barely been touched on in historical-education research as they have not been considered a subject of historiographic importance for some time. In recent years, however, school memory – in its various meanings – has been included in international historiographic thought and has become the subject of studies of notable interest in the field of the history of education both in Latin-American countries and in the Anglo-Saxon world.

The study of memory allows us to define how the present looks at the past and interprets or reinterprets it. In this sense, school memory does not interest us merely as a channel to access the schools of the past, but as a key to understanding what we know today or believe we know about schools of the past and how far what we know corresponds to reality, or whether our understanding is merely the result of prejudices and stereotypes that have become ingrained in the common sentiment, and difficult to uproot. The subject of this historical research therefore, does not consist simply of exploring school environments as they once were but consists instead of exploring the complex process of defining the sentiment that has developed over time regarding schools at an individual and collective level, based initially on lived school experiences, followed by other social and cultural agents which have contributed in part to redetermine it.

This new research perspective allows us to address an aspect whose historical dimension has up to now escaped the attention of experts in the field: the evolution of the perceived social status of the various professional profiles involved in the processes of schooling and the public status of education within a community, as well as the public image of schools and the national school system. Studying the methods of collective symbolic representation of schools

³² P. Alfieri (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, Rome, Armando Editore, 2019.

³³ P. Caspard, *L'historiographie de l'éducation dans un contexte mémoriel. Réflexion sur quelques évolutions problématiques*, «Histoire de l'Éducation», n. 121, 2009, pp. 67-82; Yanes-Cabrera, Meda, Viñao (edd.), *School Memories. New Trends in the History of Education*, cit.

and teaching over time will help to define the origin of certain burdens that continue to weigh on the public image of schools, as well as making us aware of the overall cultural dimension of these historical phenomena. In addition, studies will restore awareness to all actors in public education of themselves and their roles.

There is no unique, unequivocal school past. There are many of them, which often coexist and alternate with one another. They may conform more or less to historical reality, but they are nevertheless real and influence the views individuals or communities have of that past. This international conference aims to discover these school pasts.

Themes

Below is a selection of potential research themes around which colleagues may construct their proposals:

- reflections of a historiographic and methodological nature relating to the study of school memory and remembrances (what are the potentials? And the risks? What is the relationship between historical knowledge and other types of knowledge used in analysing the complex «phenomenology of memory»? What are the possible epistemological and methodological considerations related to or deriving from this? How far does historical reconstruction reach, and where does mythologising start? It's useful to underline that to correctly study the many representations of school pasts, it is necessary to possess in-depth knowledge of those pasts, which itself must be based on a preliminary investigation into the «hard-core of facts»³⁴ through rigorous historical research backed by the use of traditional sources. The benefits for the history of education deriving from the adoption of a Public History approach³⁵ may also be highlighted, so that scientifically produced historical knowledge may be effectively linked to wider social contexts, to meet latent or emerging cultural needs);

- «visual school memory»³⁶ comprises indirect memories of schools of the past generated in us by pictorial, graphic and photographic representations created over time³⁷, and also by illustrations in literary works for both adults

³⁴ E. Carr, *Sei lezioni sulla storia*, Turin, Einaudi, 1961.

³⁵ G. Bandini, S. Oliviero (edd.), *Public history of education: riflessioni, testimonianze, esperienze*, Florence, Firenze University Press, 2019.

³⁶ E. Colledemont, *La memoria visual de la escuela*, «Educatio Siglo XXI», vol. XXVIII, n. 2, 2010, pp. 133-156.

³⁷ I. Grosvenor, M. Lawn, K. Rousmaniere, *Imaging Past Schooling: the Necessity for Montage*, «Review of Education, Pedagogy and Cultural Studies», vol. XXII, n. 1, 2000, pp. 71-85; I. Dussel, K. Priem (edd.), *Images and Films as Objects to Think With: a Reappraisal of Visual Studies in Histories of Education*, special issue, «Paedagogica Historica», vol. LIII, n. 6, 2017, pp. 641-750.

and children and in school publications (how do the visual arts represent schools in a specific historical period? Does that idea of school correspond to the historical reality? Other sources include photo albums³⁸, as well as school portraiture and «photos of the first day at school»³⁹, within the context of individual memory, and those of daily life at school or its most symbolic and ritual moments reproduced in certain public settings (e.g., exhibitions) with the precise aim of creating reminiscences and icons in the collective memory);

- memory of oneself through oral testimony⁴⁰, diaries, autobiographies and memoirs that constitute the wide range of «ego-documents», which enable historians to research school contexts using the experiences of teachers and students and the actual educational practices performed in class. These also include educational routines that inertially continue to be practised even beyond their natural decay time, the conscious breaking of the rules imposed by the school authorities, the teachers' resilience to radical school reforms, all kinds of teaching taboos and so on: these things can all contribute to shatter the stereotypical public image of schools which has been artfully publicised by institutions;

- forms and methods of collective symbolic representation of schools and teaching over time (evolution of the public image of schools from places of civil growth, cultural progress and social redemption to antiquated institutions, «unsafe places», «refuges for layabouts with no prospects» and «places to park the children», analysing the possible causes of this; evolution of the collective perception of the role and aims of education and the perception of the social status of teachers and the public duty performed by them in schools of all levels; didactic narratives of school pasts and the creation of stereotyped, nostalgic images of a past in which schools were unquestionably better (but was this really the case?)⁴¹;

- representation of the school past in literary works, in the popular imagination and the popular narrative, in films, on the radio, and on television (the idea of school and the model of teacher and student – but also of headteachers and school inspectors – proposed by novels, short stories, films, television and radio programmes, popularising them and filtering them into the collective imagination. Which factors cause the image of each of these to vary from positive to negative? What relationship is established between individual experiences and social coding? How are questions regarding, for

³⁸ I. Grosvenor, *The School Album: issues, histories and inequalities*, «Educació i Història», n. 15, 2010, pp. 149-164.

³⁹ S. Wagnon, *La photographie de classe dans l'école française: une source sous-estimée de compréhension de l'histoire de l'école, interface entre sphères privée et publique (XIX^e-XXI^e)*, «Encounters in Theory and History of Education», n. 17, 2016, pp. 27-47.

⁴⁰ P. Gardner, P. Cunningham, *Oral History and Teachers' Professional Practice: a wartime turning point?*, «Cambridge Journal of Education», vol. XXVII, n. 3, 1997, pp. 331-342.

⁴¹ C. Shaw, M. Chase (edd.), *The Imagined Past. History and Nostalgia*, Manchester, Manchester University Press, 1989.

example, religious, political and gender discrimination dealt with?); in the same way, it is also interesting to analyse the representation of school pasts in advertisements and articles published in the daily press and periodicals, as well as documentaries, surveys and investigative television programmes;

– official representations and public commemorations promoted by local and national institutions based on a precise policy of memory, or the public use of the past⁴² (centenaries and anniversaries of the introduction of basic laws and the establishment of the various levels of schooling, and university jubilees; centenaries of great authors of children's literature, their works and their most famous creations; the production of statues and monuments, as well as simple commemorative plaques, dedicated to representatives from the worlds of school and educational thinking, at a national and local level (including unveiling ceremonies): the minting of coins, the production of banknotes and commemorative coin sets and the issue of postage stamps commemorating outstanding figures of educators, or particular anniversaries relating to public education; local and national exhibitions and displays dedicated to the history of schools; the naming of streets, squares and/or school buildings after prominent educationalists and teachers⁴³, with particular reference to the selection criteria adopted); the granting of awards and presentation of medals and diplomas for merit and memory⁴⁴ to municipal, educational or associated institutions as well as to teaching staff and school administrations, useful for acknowledging the professionalism and the social status of teaching staff and head teachers; promotion of the socialisation of memory through the constitution of forms of associationism aimed at giving value to educators awarded with decorations and recognized for their meritorious contribution to the school. All these elements have contributed to building an «imagined community» – to pick up on the historiographic concept introduced by Benedict Anderson⁴⁵;

– silence and oblivion, which – following on from the observations of Marc Augé⁴⁶ and Paul Ricœur⁴⁷, according to whom oblivion is an integral part of memory – are the fruit of a precise policy of memory, or rather a public use of the past (lacunae and neglect in public commemorations of schools, the reasons

⁴² M. Brunelli, J. Meda, L. Pomante (edd.), *Memories and Public Celebrations of Education in Contemporary Times*, special issue, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 9-394.

⁴³ M. D'Ascenzo, *Collective and public memory on the walls. School naming as a resource in history of education*, «History of Education & Children's Literature», vol. XII, n. 1, 2017, pp. 633-657.

⁴⁴ A. Barausse, «Ricambiare l'amore che portano all'educazione...». *Public memory and awards of honour of public education in Italy from the Unification to the end of the 19th Century (1861-1898)*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 185-205.

⁴⁵ B. Anderson, *Imagined communities: reflections on the origin and spread of nationalism*, London-New York, Verso, 1983.

⁴⁶ M. Augé, *Les formes de l'oubli*, Paris, Payot, 1998.

⁴⁷ P. Ricœur, *La mémoire, l'histoire, l'oubli*, Paris, Éditions du Seuil, 2000.

for which can be explained; the erasure of certain events occurring in schools of the past from the public celebrations that were widespread up to a certain period based on political upheavals and significant changes in collective sensitivities; the destruction or movement of memorials and monuments to different sites, as well as simple commemorative plaques, dedicated to outstanding figures in the teaching and schooling fields at a national and local level);

- funeral celebrations of famous exponents from the worlds of school and education, at a local and national level, promoted by friends and family to fulfil a private duty but publicly spread in order to emphasise the role they performed in the civil and cultural development of the society. What sort of teaching model is proposed by the obituaries published in school magazines⁴⁸, the eulogies given during funerals and the commemorative booklets printed by committees offering tributes to deceased teachers? How many state funerals have been held for famous teachers and educators and how many of them have had tombs and funeral monuments dedicated to them in monumental cemeteries and memorial chapels?;

- the creation of real «sites of school memory»⁴⁹, understood as material or symbolic spaces able to generate collective memories concerning school in general or individual school experiences (the foundation of museums of school and/or educational history, or museums dedicated to prestigious educators or educational reformers; the musealisation of historical schools, seen as welding points between common school memories and local identities; the promotion of historic schools⁵⁰; the opening of museums in places in which unique, unrepeatable educational experiences have occurred, or in the birthplaces of educators, reformers or educational thinkers);

- the artificial construction – through the use of the historiographic category of «invention of tradition», introduced by Eric Hobsbawm and Terence Ranger⁵¹ – by higher education institutes, colleges and universities, of actual «founding myths» regarding their origins to flaunt a long tradition of education, which will rank them in the collective imagination as prestigious and exclusive educational establishments and give legitimacy to their qualities and functions⁵²; in this sense, it might also be interesting to study the role played

⁴⁸ 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)*, Milan, FrancoAngeli, 2016.

⁴⁹ J. Meda, *The «Sites of School Memory» in Italy between memory and oblivion: a first approach*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 25-47; M. Lawn, *Building Ruins: Abandoned Ideas of the School*, in K. Darian-Smith, J. Willis (edd.), *Designing Schools, Space, Place and Pedagogy*, London-New York, Routledge, 2017, pp. 19-24.

⁵⁰ M.d.M. Del Pozo Andrés, *Madrid, ciudad educadora. Memoria de la Escuela Pública (1898/1938)*, Madrid, Ayuntamiento de Madrid – Oficina de Derechos Humanos y Memoria, 2019.

⁵¹ E. Hobsbawm, T. Ranger (edd.), *The Invention of Tradition*, Cambridge, Cambridge University press, 1983.

⁵² R. Sani, *The Invention of Tradition in the Minor Universities of United Italy: the Case of*

by school yearbooks⁵³ and by the alumni associations of these institutions in building real communities of memory, guardians of a heritage of stories and traditions able to generate a lasting feeling of identity;

– do things have a memory? School memorabilia either kept in schools, appropriate museums or by their old owners, are indeed objects of the material culture of schools, but they are also emotional catalysts able to instinctively evoke the schooling pasts of individuals and the wider community⁵⁴; at a time when we now dread the disappearance of the future as a horizon of meaning in our lives and we surrender to the «retrotopia» of Zygmunt Bauman⁵⁵, a «fashion for the past» is spreading more and more rapidly, especially in the field of cultural consumption, as a result of fairly widespread social groups reclaiming their identity. Convinced that they have not yet entirely fulfilled their «generational entelechy»⁵⁶, they are therefore bent on recovering their past, by re-implementing it, and the fruit of this socio-cultural phenomenon – based on the feeling of nostalgia, which is cleverly exploited by «vintage marketing» – is the revival of historic school brands, which come back into fashion after many decades.

Calendar

15 December 2021: deadline for sending proposals for papers

31 January 2022: notification of acceptance or refusal of proposals received

12-13-14 December 2022: Conference takes place

15 February 2023: deadline for final contributions to be published in the Conference Proceedings

the Thirteenth-century Origins of the Studium Maceratense, «History of Education & Children's Literature», vol. VII, n. 1, 2012, pp. 485-504.

⁵³ P. Dávila, L.M. Naya, J. Miguelena, *Yearbooks as a source in researching school practices in private religious schools*, «History of Education & Children's Literature», vol. XV, n. 2, 2020, pp. 219-240.

⁵⁴ 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.M. Badanelli Rubio, M. Poveda Sanz, C. Rodríguez Guerrero (edd.), *Pedagogía museística: Prácticas, usos didácticos e investigación del patrimonio educativo. Actas de VI Jornadas Científicas de la Sociedad Española para el Estudio del Patrimonio Histórico Educativo*, Madrid, Universidad Complutense de Madrid, 2014, pp. 203-217.

⁵⁵ Z. Bauman, *Retrotopia*, Cambridge, Polity Press, 2017.

⁵⁶ K. Mannheim, *Das Problem der Generationen*, in Id., *Wissenssoziologie: Auswahl aus dem Werk*, Neuwied, Luchterhand, 1964, pp. 509-565.

Venue

The conference sessions will be held at the headquarters of the Department of Education, Cultural Heritage and Tourism of the University of Macerata.

Languages

The official languages of the conference will be French, English, Italian, Portuguese and Spanish. However, speakers must undertake to present the final version of their contributions in English for publication in the official Conference Proceedings.

Enrolment

Scholars who are interested in taking part in the conference as speakers must present a proposal (abstract) of max. 3,000 characters (including spaces), which must include: first and last names of the author(s), institutional affiliation, paper title and a maximum of five keywords. Title, abstract and keywords must be uploaded both in the language used for the presentation and in English.

The deadline for submission is 15 December 2021; enrolment must be carried out using the appropriate Google Form to be found in the dedicated section on the project's official website <<http://www.memoriascolastica.it/>>. A special commission of anonymous referees – appointed by the International Scientific Committee presidency – will evaluate the proposals presented, taking into account thematic relevance and scientific quality. The Organising Secretariat will notify those concerned of their acceptance or otherwise of their proposals by 31 January 2022.

A maximum of two papers will be permitted per speaker, including in collaboration with others.

Travel expenses will be the responsibility of the speakers and cannot be refunded.

Publication of conference proceedings

After the conference, the works presented will be published with a high-profile publishing house, able to guarantee their distribution internationally.

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